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ABSTRACT

This document examines the circumstances under which vocational training in Greece is provided for jobs in the textile and clothing industries. Its objective is to identify guidelines for vocational training for a skilled work force at regional and national levels and to contribute to job mobility between industries. Statistical data, publications, and the views of civil service and private sector personnel were analyzed for this report. Following an introduction, chapter 2 describes the characteristics and development of the ready-to-wear clothing and textile industries. Chapter 3 describes the characteristics and development of employment in these industries. Chapter 4 describes regional developments. Chapter 5 addresses future growth prospects of the two industries. Skilled labor and vocational training are the subjects of chapter 6. Chapter 7 discusses employment prospects in the clothing and textile industries from 1987 through 1995. Chapter 8 offers conclusions and proposals. A 26-item bibliography and a list of individuals who contributed to the study conclude the document. (CML)

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Vocational training in the textiles and clothing industries in Greece

European Centre for the Development of Vocational Training

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I. Drimousis
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Chapter 1

INTRODUCTION

The purpose of this document is to examine the circumstances under which vocational training in Greece is provided for jobs in the Clothing and Textile industries. The main objective is to identify guidelines for vocational training/further education and skills which will meet the requirements of both industries for a skilled workforce at a regional and/or national level. In this way, the crucial role of vocational training in maintaining or improving employment in each industry is emphasised. At the same time it can also effectively contribute to job mobility between industries, following suitable training or retraining.

Within this framework, the basic characteristics, parameters and development of each industry are examined, as they stand today. While most of the two industries' activities are in decline there are nonetheless certain developing sectors which are examined in detail. Prospects for the two industries in the next 8 years (1987-1995) are combined with employment forecasts for the sector as a whole as well as for certain basic professions.

A very wide range of statistical data were used, covering the two industries both at national and regional level

over a period of 15 years. Certain publications relating to the two industries were also taken into consideration. It is worth noting however that, to date,there has been no special investigation into the state of vocational training in Greece for the Clothing and Textile industries. Significant contributions were made by both civil service and private sector personnel through their knowledge relating to the two industries and vocational training. Their views proved useful and were of valuable assistance in analysing the conditions under which the industries operate, in forecasting future prospects and in investigating vocational training needs for both new and existing jobs. Bibliography and contacts in contributing organisations are presented at the end of this document.

Chapter 2

CHARACTERISTICS AND DEVELOPMENT OF THE READY-TO-WEAR CLOTHING AND TEXTILE INDUSTRIES

2.1 Characteristics and performance of the two industries

The clothing and textile industries continue to be the largest sectors of Greek industry from the point of view of production, employment and exports.

More specifically, during the 1970s fixed capital investment in the two industries represented around 20% of total manufacturing sector investment. Between 1960-1980, the textile industry dominated investment activity amongst the twenty industrial sectors. More recently, in 1981-85 and according to statistics relating to loan approvals under development law No.1262/82, the volume of investment in the two industries had fallen to around 12% of total manufacturing sector investment. This can be attributed mainly to Textiles as the Clothing industry seems to be maintaining the growth rates of the 70s. Specifically, its contribution to total manufacturing sector investment[1] accelerated from 2-3% in the 70s to 5-6% in the period 1981-85, thus matching textile industry investment levels. It is also more decentralised, with a high proportion of companies being set up in the less developed regions (C

1.The statistics refer to the combined clothing and shoe trade. This does not significantly distort the conclusions however, as the shoe sector is in decline and its contribution to investment limited.

and D areas of development incentives). It also makes a larger contribution to the creation of new jobs. Employment in the two industries nevertheless increased significantly during the period 1970-73 (7%) and 1973-80 (5.5%). Thus, employment levels rose to around 20% of total manufacturing sector employment. Interesting to note is the fact that Greece is one of the few OECD countries to show continued growth of employment levels in the clothing and textile sectors from 1963 onwards. Table 2.3 shows that, with the exceptions of Ireland, Italy and Portugal whose employment levels remain stable, the other OECD countries show continuous falls in their employment levels in the 1970s period.

In the 1970s in Greece, unemployment in the clothing and textile industries hardly existed. During this period around 30-40000 new jobs were created. By 1984 however, levels had dropped by 10% and although 1985 was the first year since 1984 to show a significant recovery, 3000 skilled textile workers were, according to the OAED's 1984 records, registered as unemployed. In the same 1980-84 period, clothing industry employment levels rose by around 5% for thr overall period while exhibiting annual fluctuations. Table 3.3 shows overall employment statistics for both industries from 1978 to 1985, by gender and by working status.

The two industries' contribution to production rose to 22-25% of the total manufacturing product in the 70s, during which output grew at a rate of 8% a year in com-

parison 6% of total manufacturing output growth. Apart from this, a phenomenon which characterises all traditional Greek industrial sectors was observed which was that, until 1970 industrial production was dominated by heavy industry and intermediate products. This trend was reversed during the 70s and after 1980 the clothing and textile industry's contribution to industrial production stabilised at around 20-22%

In the textile industry, production of cotton yarns and fabrics is based on high-grade locally grown fibres. Of the 12 EEC member-states, Greece is the largest producer of cotton, followed by Spain who produce about half as much. Woollen yarns and fabrics are made mainly with imported raw materials. Synthetic and artificial yarns are also made from locally produced synthetic and artificial fibres but using mainly imported raw materials (nylon, polyesters, acrylics). Silks are made from local silkworms which are almost exclusively cultivated in the Evroy-Thrace region.

The clothing industry uses locally made fabrics and imported fabrics in approximately equal proportions. The locally made fabrics are usually low or medium grade while the imported fabrics tend to be of much higher quality due to better dyeing, finishing, design and variety. A large part of the clothing and knitwear production is making-up (facon) for Clients of other EEC member-states; mainly West Germany.

The Clothing and Textile industries are amongst the few Greek industries which have succeeded in reversing their trade deficits to such an extent that, in the 70s their contribution to the country's foreign exchange reserves was very important. Both industries are export-intensive and account for 20% of Greece's industrial exports to the EEC.It should be noted however that imports of textile products (fabric and clothing) have been growing in recent years. They represent a small proportion of total imports (3%) but there is an upward trend in the last 5 years.

The crisis in the textile and clothing sectors, both in Greece and abroad, coupled with a fall in the competitivity of local production have been significant factors in causing today's adverse situation. In addition low employment levels in textiles, the worsening economic position and efficiency of business in both industries, the limited flexibiity and responsiveness of Greek industry to continually changing consumer requirements of international fashion, deficiencies in the management and operation of export marketing as well as the lack of high calibre personnel in many businesses are cited as the major factors responsible for the recent troubled state of the two industries.

2.2 Developments at sub-sector level

2.2.1 Production

Production trends in categories of similar products are

measured on the basis of the industrial production index to four figures (ISIC). Also certain products in businesses which employ upwards of 5 people are monitored in absolute numbers. (See Tables 2.1 and 2.2).

From available statistics of the industrial production index for textiles a significant slowdown can be observed in the average annual rate of product increase from 11.7% in 1970-75 to 4% in 1975-80. The following two years, nevertheless, were a period of peak activity in the sector. This phenomenon also occurred in Greek industry as a whole. During the next 5 years overall productivity fell at an annual rate of 1.7% , while most sub-sectors of the textile industry began to show drastically falling productivity rates. The only exceptions were the cotton yarn and fabrics (tarif no 232.2) and the knitting sub-sectors (236.2) which continually increased production during the whole of the 1970-1985 period. These sub-sectors are still classified as dynamic and seem to have maintained their competitiveness despite the international pressures . On the other hand, the woollen yarns and fabrics sector (231.4) has been the most affected by the crisis. All the other textile sub-sectors fall in-between. Also, significant fluctuations in production volume can be observed, both between sub-sectors and between the periods examined.

The picture of textile production trends is completed by a look at the absolute production volume figures of certain products between 1970-83. Table 2.2 shows that production of cotton yarns and fabrics, mixed fibres and fab-

rics and knitwear production increased throughout the 1970-83 period, but slowing down significantly in 1980-83. 1983 was the worst year for textiles overall as well as for most sub-sectors.

The Industrial Production Index for ready-to-wear gives a better picture (Table 2.1). All sub-sectors showed significant production increases from 1975-80. The main gains were in mens', womens' and childrens' clothing sectors (243.1,2,5) which grew at 19% between 1970-75 and 12% in 1975-80. After 1980 and more particularly during 80-85, there is a substantial fall-off and the above-mentioned sub-sectors have since stabilised at around 0.2% growth.

A similar picture is given in Table 2.2 with data on production volumes of mens', womens' and childrens' clothing between 1980-83.

1983 was the worst year for the textile industry as was 1980 for the clothing industry. It was during these two periods that most of the afflicted businesses began to to show serious strain. In 1983 and 1984 a whole series of the biggest, mainly textile businesses were registered as 'troubled enterprises' and became eligible for aid under Law No. 1386/83. The following companies fall into this category: Peiraïki-Patraïki, Michaïlides AE, Douridas AE, Perfil AE, Volos Clothing Company, Athina AE.

The 16% drop in textile production during 1981-3 was much larger than the drop in industrial production overall

(-7% in 1980-83) and bigger compared to most industrial sectors. From 1985 onwards however most textile sub-sectors began to show signs of recovery.This recovery seems to be continuing through 1986 according to available figures for the first 3 quarters. This recovery was assisted partly by the (slight) recovery of international demand and partly by the policy of economic stability pursued by the government since October 1985, to the point that competitivity was strengthened and troubled businesses in both industries were able to take steps towards recovery.

2.2.2. Within sector and between sector production links. Amongst the various sectors of Greek industry, the Clothing and Textile industries are the most closely linked in terms of production.

This can be verified by examining the corresponding sub-sectors in each industry and the inflow of products according to their origin ie. local or imported. Figures from 1970 are used for this particular analysis (Tables 2.4 and 2.5), more recent statistics in the format required not being available.[1] After 1970, structural changes in Greek industry also affected the Textile industry and subsequently certain inter-industry links. This analysis therefore is used only to illustrate the point.

Table 2.4 and 2.5 allow us to draw certain basic conclusions: 83% of the overall demand in the Textile industry is for primary and manufacturing products with certain

fluctuations at sub-sector level. Similarly, 95% of demand in the Clothing industry is for manufacturing products. This is mainly for woven cotton-woollen fabrics and continuous fibre synthetic fabrics from the Textile industry (90%) (sub-sectors 231, 232 and 233). The degree of interdependence within the industry is quite high in 231, 232, 235 and 236 sub-sectors given that there is 80% of reprocessing carried out on the same same base material at intermediate processing levels. The dyeing and finish-sector (237) is closely linked with the chemical products sector (dyes and bleaches) but it also relies to a great extent on imported raw materials (40%).Almost all textile sub-sectors make heavy use of the chemical products 311, 313 and 319 which command between 67% and 86% of demand at intermediate processing levels.

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1. 1980 inflow and outflow figures for each sector of the Greek economy are currently being worked on (KEPE-YPETHO)

2.2.3. Production capacity and production levels.
Production capacity in the two industries can be measured by the cumulative stock of certain basic categories of mechanical plant at various key stages of the manufacturing process. Mechanical plant is to a large extent imported because local production is negligible. More specifically, in the yarn spinning sector the number of installed spinning heads are good indicators of its overall production capacity. For example, numbers of spinning heads (standard fabric) in cotton mills grew very fast in the 70s, from 485000 on 1970, 993000 in 1975, 1575000 in 1980 to 1650000 in 1984. Plant is relatively up to date and in 1984 represented around 10% of total EEC productivity (10 member -states). Production units operate 2 to 3 shifts and production levels were high all through the 1970s. In recent years however, they have fallen to around 75-80% capacity, the worst period being 1983-4 (75%). In woollen yarn mills capacity is estimated at around 350000 working spinning heads but production levels are worryingly low. According to certain estimates[1] levels fell from 70% in 1981 to 52% in 1983, although there has been a slight recovery since then.

In the weaving sector production capacity for cotton fabrics is at around 8500 looms. The majority (95%) are fully automated and account for around 4% of total EEC productivity (EEC-10). Production levels are estimated at around 75-80%, the same as for yarn mills.

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1. IOBE, probability study

Production capacity in the woven woollen yarn sector is estimated at around 3000 looms and that of the woven artificial and synthetic fibre fabrics at 2000 looms.

In the knitting sub-sector capacity is at 700 different types of machinery (mainly of the circular-type) for knitted underwear and most of which are quite up to date. Production capacity for knitted outerwear is around 2500, quite contemporary,machines. Overall production levels for the knitting sector are at 80% in recent years, 1984 being the lowest point at 73%.

There are no reliable data for the Clothing industry on basic plant ie sewing machines. Even statistics on imported machinery are not comparable being sometimes recorded in tonnes and sometimes in number of machines, which prohibits proper evaluations of production capacity. However, it can be said that during the 70s there seems to have been an increase in the number of imported machines, although the numbers began to fall off from 1980 onwards. Attempts to measure productivity levels present similar difficulties and any estimates should allow for a wide margin of error. Nevertheless,according to certain sources[1] productivity was around 75% during 1983 and 1984.

2.2.4 Exports of clothing and textile products.
The development of imports and exports in the main product categories of the two industries for 1976-85 is laid

1. KEPE: Survey of production levels in Greek industry. I. Drimousis (Survey currently being researched).

out in Tables 2.7-2.12. The analysis also refers to imports/exports of other EEC member-states and other countries.

One of the characteristics of the Greek Clothing and Textile industry is the amount of trade with other EEC countries. Another feature is the trade surplus of the two industries which is one of the highest for Greek industrial exports overall. Specifically, the contribution to exports of the two industries grew from 15% in 1970 to 25-30% in the period 1980-85. Tables 2.7-2.12 also show up the fact that dependence on other EEC countries for exports is higher in Clothing than in Textiles.

With regard to the Textile industry, export statistics show that volumes grew from 75000 tonnes in 1976 to 121 000 tonnes in 1984 but this was followed by a 10% drop in 1985 due to falling yarn exports to the EEC. Apart from this growth rates slowed and even dropped in certain categories of textile products in the period immediately following Greece's accession to the EEC in 1980-85. At the same time , there was a dramatic increase in imports of diverse products from EEC countries.

Cotton yarns are Greece's major exports and more than 90% of production is destined for EEC countries, mainly West Germany. Yarn exports account for two thirds of total textile products. Synthetic and artificial yarn exports also contribute in a much smaller way while woolen yarn exports are not significant. Cotton fabrics are the only

product to show a marked increase in exports during the whole of the 1976-85 period, both in value and volume. 80% goes to EEC countries.

The dramatic increase in imports of textile products from EEC countries in recent years resulted in a growth in share from 60% in 1976-80 to 80% in 1984-5.

During the first period there is a fall in imports in almost all product categories. In 1981-85, the period immediately following accession, the trend is reversed and the annual growth rate is reached for almost all product categories. This is due to the lifting of import duties relating to EEC countries which had been trade barriers for the protection of local industry. This, together with only limited export growth damaged the position of the Greek Textile industry even further.

Synthetic fabrics and fabrics made from artificial fibres followed by high grade cotton fabrics are the main textile imports, 80-83% of which come from European countries. Yarns are the next largest category both in volume and value where, during the post-accession period 1981-85, growth was at around 17% annually, whereas it had been 3.5% in1976-80. At the same time,while in 1976 90% of imported yarns came from EEC countries, this share fell to 80% in 1985. The majority of the synthetic fibre yarns come from third world countries such as Egypt and Brazil as well as from Japan. Finally imported woolen fabrics and yarns come mainly from EEC countires. These

increased slightly during 1981-85, while yarns underwent a corresponding decrease.

In the Clothing industry, imports increased dramatically from 157000 tonnes in1976 to 221000 tonnes in 1980 and 292000 tonnes in 1981 to 370000 tonnes in 1984-5.

It must be noted that from 1981 onwards the figures include exports of making-up items (facon) and are therefore not comparable with export figures of previous years. Even so, the growth is quite spectacular, even making allowances for the facon figures. Clothing exports to EEC countries continue to dominate exports in all categories of clothing (90%). The proportion relating to womens' clothing is higher than for mens' and childrens' while for underwear it is around 95%. The main country of destination is West Germany. Compared to exports, clothing imports are relatively limited; around 10-15% of the export levels.

Knitted outerwear is the largest category of exported clothing. 1981-85 growth rates (13.3%) were even faster than in 1976-80 (5.6%). Womens' clothes are the second largest export and their 81-85 growth is even more spectacular when compared to the figure of the immediately preceding period which was -1.6% (1976-80). Mens' and Childrens' clothing exports grew more modestly in 81-85 compared to growth of 20% and 30% during 76-80.

2.3 Labour cost and competitivity

Labour costs in the Greek textile industry are the second largest industrial cost after the cost of raw materials. It is estimated at 20-22% of industrial cost and is among the highest of textile labour costs in EEC countries.[1]

The third largest costs are the financial and economic operating costs in the textile industry which is estimated at more than 2 to 4 times the corresponding costs in other EEC countries.

From the synthesis of industrial cost and its development over time, it is evident that labour costs are a critical factor in the international competitivity of Greek textile products. When making international comparisons we also have to take into account labour productivity levels along with exchange rates and their fluctuations. In recent years the competitivity of Greek textiles has been adversely affected by large increases in labour costs coupled with a slowdown in labour productivity growth rates. Foreign exchange policies have attempted to soften the consequences to a greater or lesser extent through various repositionings (devaluations) of the drachma against other currencies.

The truth of this statement is further supported by examination of comparative labour costs in a number of textile producing and exporting countries. More specifically, in Table 2.6, using the dollar as a base, we can see that

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1. See Programme for Clothing & Textile industries, YPEPF 1984

there are significant differences in hourly labour costs in the countries examined. The highest are to be found in Belgium and Holland and are 10 times higher than those in other textile exporting countries such as Portugal and Turkey. This ratio increases to 30:1 when compared with countries such as Pakistan who are very active exporters coupled with a very low level of economic development.

The position of the Greek textile industry relating to labour costs amongst the 30 countries in Table 2.6 appears to have worsened. Ranking 19th in 1981 it rose to 16th position in 1984, that is, after the UK and before Ireland (17th) and Spain (18th) while Portugal is in a much more favourable position at 29th. Apart from ranking, changes in the labour cost index are perhaps more significant, as expressed with Greece as a base (=100). According to this index 1981 labour costs in Ireland and Spain were 22 and 25% higher than in Greece. By 1984 they were 2 and 10% lower. In relation to Portugal, Greek labour costs were 47% higher in 1981 and this gap had widened to 70% by 1984. Compared to the UK, Greek labour costs were 57% lower in 1981 but the difference had narrowed to 27% by 1984.

The above developments do not augur well for the future competitivity of the Greek textile industry even in its major export market of the European Community. There is also a need for a concerted effort on the part of most local businesses to increase their labour productivity within an overall attempt at increasing competitivity.

This effort becomes even more important during current attempts to revitalise troubled businesses in both the Clothing and Textile industries and in the light of the Government's action to waive export subsidies in the following three years (87-89) in order to come into line with EEC policy.

TABLE 2.1: INDICES OF INDUSTRIAL PRODUCTION VOLUME IN CLOTHING AND TEXTILES
(1970 = 100)

SECTOR/SUB-SECTOR	1975	1980	1981	1982	1983	1984	1985	85|75	85|80	80|75
23 TEXTILES	173,7	211,1	221,5	197,4	185,5	186,5	193,7	1,1	1,7	4,0
231.2 Nat.&Art.Wool Yarn-makers	102,2	81,5	83,9	72,3	64,9	64,9	72,9	3,3	2,2	4,4
231.4 " " " Weavers	103,1	93,8	95,9	93,1	83,7	74,3	71,7	3,6	5,2	1,9
232.2 Nat.&Art.Cotton Yarn-malers	152,2	274,7	258,8	267,5	276,6	284,9	293,4	6,8	1,3	12,5
232.4 " " " Weavers	106,2	196,6	164,5	162,6	169,0	166,3	181,5	5,5	1,6	13,1
233.2 Nat.&Art.Silk Yarn-makers	393,3	501,9	509,0	487,7	431,6	453,2	478,5	2,0	1,0	5,0
233.4 " " " Weavers	264,8	274,3	242,1	219,5	207,1	190,5	163,9	4,7	9,8	0,7
234.2.4.5 Hard fibre Yarn & Fabric	102,5	227,0	213,0	206,7	202,0	227,4	175,9	5,5	5,0	17,2
235.1 Thread-making industry	219,9	209,3	195,4	178,4	187,1	163,8	163,8	2,9	4,8	1,0
235.2.Embroidery etc.	129,1	139,8	127,5	100,3	75,5	66,9	46,6	9,7	19,7	1,6
236.1 Sock-making	136,6	136,0	141,3	132,7	113,7	123,9	117,7	1,5	2,8	0,1
236.2 Knitted underwear	150,8	212,6	198,3	190,0	186,5	180,2	225,8	4,I	1,2	7,1
236.3 Knitted fabrics & Clothing	230,4	224,1	316,7	170,0	156,1	162,5	156,4	3,8	6,9	0,5
238.1 String and Rope-making	97,9	123,1	113,8	95,7	84,6	96,6	83,9	1,5	7,4	4,7
239.1 Carpet-making	213,0	511,1	482,2	454,3	311,9	282,1	380,4	6,0	5,7	19,1
24 CLOTHING - SHOES	183,4	238,6	226,2	236,2	214,8	216,3	221,4	1,9	1,5	5,4
243.1.2.5 Outerwear (Men,Wom.&Chil)	240,0	415,4	370,5	436,1	412,5	430,2	410,1	5,5	0,2	11,6
243.6 Underwear	162,2	158,6	149,0	162,3	133,8	124,3	123,9	2,7	4,8	0,4
TOTAL FOR THE INDUSTRY (20-39)	150,5	194,8	192,3	182,4	181,5	185,6	188,0	2,2	0,7	5,3

Source: ESYE (unpublished statistics)

TABLE 2.2: GROWTH OF DOMESTIC TEXTILE PRODUCTION
1970-83

PRODUCTS	UNITS	1970	1976	1980	1983	RATE OF CHANGE % 1983/70	1983/76
I. YARNS	000 tonnes						
1. Cotton		41,8	109,7	127,0	128,7	9,0	2,3
2. Wool		10,0	16,5	13,6	11,1	0,8	-5,5
3. Artificial-Synthetic		16,9	46,7	52,7	46,6	8,1	-0,3
4. Mixed		5,7	11,4	16,5	15,4	7,9	4,4
5. Hard fibres		1,9	4,4	3,4	2,4	1,8	-8,3
6. Silk		0,015	0,017	0,008	0,005	-8,1	-16,0
II. FABRICS							
1. Cotton		19,1	25,9	42,3	54,1	8,3	11,1
2. Wool		3,9	3,2	2,7	2,0	-5,0	-6,5
3. Artificial-Synthetic		8,1	10,4	14,2	12,9	3,6	3,1
4. Mixed		2,8	8,8	13,3	10,8	10,9	3,0
5. Hard fibres		1,2	1,5	1,3	0,8	3,1	-8,6
6. Silk		0,018	0,013	0,017	0,011	-3,7	-2,4
III. KNITTED-CARPETS etc							
1. Bedcovers		6,6	19,5	10,7	8,5	2,0	-11,2
2. Carpets-rugs	mn meters	0,8	3,9	6,1	6,5	17,5	7,6
3. Thread	000 tonnes	1,05	2,75	3,3	3,0	8,4	1,2
4. Socks	mn dozens	3,5	7,05	8,4	8,0	6,6	1,8
5. Knitted underwear	mn pieces	25,8	56,1	68,2	70,2	8,0	3,2
6. Knitted clothing	mn pieces	9,9	43,8	48,5	44,6	12,3	0,3
7. Ropes	000 tonnes	4,9	4,9	3,2	3,9	-1,7	-3,2
IV. WOVEN OUTERWEAR	mn pieces			50,4	48,7	1,1	
1. Mens				15,0	11,7	-7,9	
2. Womens				27,2	28,3	1,3	
3. Childrens				8,2	8,8		
V. LEATHERWEAR				0,08	0,1	7,7	

1. Production of units of more than 5 people

Source: Annual Survey of Industrial Products ESYE

TABLE 2.3 ANNUAL % EMPLOYMENT GROWTH RATES IN OECD COUNTRIES: CLOTHING AND TEXTILES

Country	1963-70	1970-73	1973-79
Austarlia	1,6	-3,3	-5,0
Austria	-4,1	-3,3	-2,1
Belgium	-2,0	-3,5	-7,8
Canada	0,5	1,8	-1,9
Denmark	-2,2	-2,1	-6,0
Finland	1,3	0,9	-2,4
France	-1,8	-0,7	-3,6
West Germany	-1,8	-5,2	-3,0
GREECE	0,7	7,4	5,1
Iceland	0,0	0,0	0,0
Italy	1,3	-1,2	-0,7
Japan	0,7	-1,9	-3,9
Holland	-4,5	-8,9	-9,2
Norway	-3,1	-7,8	-0,6
Portugal	6,4	1,3	-0,7
Spain	2,6	8,6	-2,8
Sweden	-6,8	-5,9	-5,3
Switzerland	-1,2	-5,6	-5,5
United Kingdom	-3,3	-2,3	-3,0
United States	0,8	0,9	-1,8
COUNTRIES TOTAL	-0,5	-0,9	-2,6

Source: OECD LABOURFORCE STATISTICS

TABLE 2.4: % DISTRIBUTION OF MATERIALS IMPORTED FOR USE IN THE CLOTHING AND TEXTILE INDUSTRIES (1970)

SECTOR/SUBSECTOR	TEXTILE SUBSECTORS						CLO'ING
	231	232	233	235 & 236	237	Total 23	243
PRIMARY SECTOR	8,3	1,4	4,2	0,1	0,3	20,1	-
MANUFACTURING (20-39)	75,0	77,8	81,7	79,4	64,1	62,6	94,8
231 Wool Yarn & Fabric	16,6	1,1	1,4	12,8	-	5,6	39,8
232 Cotton Yarn & Fabric	1,7	13,8	5,0	13,3	2,2	7,3	28,1
233&234 Art.&Syn.Continuous Fib.	2,7	2,2	36,6	40,6	0,5	12,7	18,4
231.1 , 232.1, 233.1	29,0	37,5	3,0	0,6	-	16,9	0,9
235&236 Knitwear,Embr.,Tapes	-	-	-	2,1	0,1	0,3	3,0
237 Dyeing,Finishing	12,1	15,7	8,6	-	-	7,7	-
271 Paper,Carton making	0,6	0,2	0,2	1,5	1,2	0,4	0,1
280.1 Publications,Printing	0,1	0,2	0,1	0,1	0,5	0,1	0,1
280.2 Printers,Bookmakers	0,5	0,6	0,8	-	1,4	0,5	0,2
311.6,319.6 Plastics,Syn.Fibres	8,3	3,3	14,4	2,8	-	4,9	-
311.2,313 Dyes	0,9	0,8	1,4	0,4	38,8	1,8	-
319 Various chemicals	-	0,1	-	-	2,6	0,1	-
321, 329 Petrol-related	0,7	0,4	0,7	0,8	7,6	0,8	0,1
36 (Partly) machinery	1,1	1,4	1,2	1,8	5,2	1,3	0,1
ENERGY,WATER,CONSTRUCTION	1,9	2,5	2,1	1,7	7,8	2,0	0,5
TRANSPORT,COMMUNICATIONS	2,9	2,9	3,3	3,9	7,8	3,2	1,4
OTHER (COMMERCE,BANKS,INS'ANCE)	11,9	15,4	8,8	14,9	20,0	12,0	3,3
TOTAL INTERMEDIATE DEMAND %	100,0	100,0	100,0	100,0	100,0	100,0	100,0
VALUE mn drs.	2 021	3 320	1 730	1770	314	11 961	10 925

Source: Analytical inflow-outflow tables for the Greek Economy,1970
A. Mylonas KEPE 1980.

TABLE 2.5: % OF DOMESTIC MATERIAL USED IN CLOTHING AND TEXTILE INDUSTRIES (1970)

SECTOR/SUBSECTOR	TEXTILE SUBSECTORS					CLOTHING	
	231	232	233	235 + 236	237	23	243
PRIMARY SECTOR	60,0	95,1	51,1	100,0	100,0	95,1	100,0
MANUFACTURING (20-39)	56,9	87,4	71,5	81,8	69,4	76,1	79,4
231 Wool Yarn & Fabric	82,4	100,0	89,0	84,2	100,0	85,4	92,2
232 Cotton Yarn & Fabric	81,3	93,7	99,3	98,8	100,0	93,4	84,1
233&234 Cont.Fibre Syn.Fabric	85,7	90,9	76,8	80,9	100,0	79,7	45,5
231.1, 232.1, 233.1	46,0	89,1	47,8	58,6	-	74,0	100,0
235 & 236 Knitwear,Embr.,Tapes	100,0	100,0	-	97,9	100,0	98,0	55,3
237 Dyeing,Finishing	59,0	98,8	82,6	-	-	85,5	-
271	100,0	100,0	100,0	100,0	100,0	100,0	100,0
280.1	100,0	100,0	100,0	100,0	100,0	100,0	100,0
280.2	100,0	100,0	100,0	100,0	100,0	100,0	100,0
311.6, 319.6	20,0	14,1	33,0	18,7	100,0	24,7	100,0
311.2, 313	50,6	53,8	52,7	62,3	62,3	62,1	-
319	100,0	100,0	100,0	-	100,0	100,0	100,0
321, 329	100,0	100,0	100,0	100,0	100,0	99,2	100,0
36 (partly) Machinery	12,8	12,9	13,0	12,9	12,9	15,6	13,1
ENERGY,WATER,CONSTRUCTION	100,0	100,0	100,0	100,0	100,0	100,0	100,0
TRANSPORT,COMMUNICATIONS	100,0	100,0	100,0	100,0	100,0	100,0	100,0
OTHER(COMMERCE,BANKS,INS'CE)	100,0	100,0	100,0	100,0	100,0	100,0	100,0
TOTAL INTERMEDIATE DEMAND %	64,3	90,1	74,7	85,6	80,4	84,0	80,5

Source: Analytical Inflow-Outflow Tables for the Greek Economy,1970
A. Mylonas,KEPE,1980.

TABLE 2.6: COMPARISON OF HOURLY LABOUR COSTS IN THE TEXTILE INDUSTRIES OF VARIOUS COUNTRIES

COUNTRY RANKING 1984	1984		1981		
	$ USA	INDEX GREECE=100	RANKING	$ USA	GREECE=100
1 Holland	9,80	228	4	9,16	256
2 Norway	9,66	225	3	9,26	259
3 Belgium	8,64	206	2	9,34	261
4 Switzerland	8,65	201	6	8,18	228
5 USA	8,60	200	9	7,03	196
6 Canada	8,50	198	10	6,64	185
7 Denmark	7,97	185	5	8,80	246
8 Sweden	7,91.	184	1	9,55	267
9 W.Germany	7,54	175	7	8,17	228
10 Austria	6,76	157	15	5,04	141
11 Italy	6,35	148	8	7,23	202
12 Japan	6,28	146	16	4,90	137
13 France	6,07	141	11	6,40	179
14 Finland	6,05	141	14	5,48	153
15 Great Britain	5,46	127	13	5,57	156
16 GREECE	4,30	100	19	3,58	100
17 Ireland	4,20	98	18	4,37	122
18 Spain	3,87	90	17	4,48	125
19 Venezuela	3,27	76	12	5,63	157
20 Syria	3,12	72	25	1,58	44
21 Colombia	2,81	65	24	1,76	49
22 Mexico	2,62	61	20	3,06	85
23 Argentina	2,23	52	22	2,03	57
24 Nigeria	2,13	50	-	-	-
25 South Korea	1,84	44	27	1.35	38
26 Hong-Kong	1,65	38	26	1.42	40
27 Taiwan	1,64	38	28	1.32	37
28 Brazil	1,63	38	21	2.39	67
29 Portugal	1,28	30	23	1.88	53
30 Turkey	1,19	28	29	1.07	30

Source: Werner International (Management Consultants)

CLASSIFICATION OF TEXTILE PRODUCTS ACCORDING TO THE TTDE (CUSTOMS TARIFF CODE)

Tariff Code	PRODUCT CATEGORY
65	TEXTILES
651	YARNS AND WEAVING THREADS
651.2	Wool Yarns
651.3	Cotton Yarns
651.4	Synthetic Yarns
651.7	Artificial Yarns
652	COTTON FABRICS
653	FABRICS FROM ARTIFICIAL-SYNTHETIC WOVEN FIBRES
654	OTHER FABRICS
655	KNITTED FABRICS OR OTHER KNITTED GOODS
656	TULLE-LACE-EMBROIDERY ETC
657	SPECIAL FABRICS AND RELATED PRODUCTS
658	READY-MADE GOODS AND WEAVING MATERIALS
658.3	Bedcovers
658.4	Carpet products
658.9	Various
659	CARPETS AND FLOORCOVERINGS
84	READY-TO-WEAR CLOTHING
842	NON-KNITTED MENS' INNERWEAR
843	NON-KNITTED WOMENS' INNERWEAR
844	NON-KNITTED UNDERWEAR
845	KNITTED OUTERWEAR
846	KNITTED INNERWEAR
848.10	FUR CLOTHING
848.31	LEATHERWEAR
263	COTTON
266	SYNTHETIC FIBRES SUITABLE FOR CLOTHING (RAYON)
267	OTHER SYNTHETIC-ARTIFICIAL FIBRES SUITABLE FOR CLOTHING
	ANIMAL HAIR

TABLE 2.7: TEXTILE INDUSTRY EXPORTS [1,2]

VOLUME 000 TONNES — VALUE mn US $-CURRENT PRICES

Code	1976		1980		1981		1982		1983		% Annual Change Vol		Val
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	80/76	83/81	83/81
65	75,2	240,4	97,1	486,4	106,3	483,2	102,4	428,5	113,9	442,0	6,6	3,5	-4,3
	63,4	196,5	76,5	388,2	83,1	359,8	86,1	343,7	95,2	361,2	4,8	7,0	0,2
651	58,3	160,3	75,9	348,3	78,4	322,7	74,5	280,0	78,1	277,3	6,8	-0,2	-7,3
	49,1	77,3	60,6	280,3	62,2	248,0	64,3	232,2	68,1	238,5	5,4	4,6	-1,9
651,2	0,64	2,6	0,69	6,2	1,3	9,2	0,99	5,9	1,1	5,7	1,9	-8,0	-21,3
	0,44	2,9	0,54	4,9	0,9	6,5	0,8	5,0	1,0	5,0	5,2	5,4	-12,3
651,3	48,3	126,9	61,9	281,2	54,1	221,0	58,0	209,3	61,9	218,5	6,4	7,0	- 0,5
	44,1	114,4	52,7	240,2	48,9	196,2	54,1	193,2	56,5	200,1	4,5	7,5	1,0
651,4	4,9	17,6	7,6	33,9	10,6	39,7	9,5	39,3	9,9	30,7	11,6	-3,3	-12,0
	1,8	7,0	3,4	17,9	4,8	17,6	6,0	21,5	6,9	20,6	17,2	19,9	8,2
651,7	4,2	10,9	5,2	23,6	11,4	46,8	4,9	20,1	5,3	19,1	5,5	-31,8	-36,1
	2,5	7,2	3,6	16,3	7,1	25,3	2,6	10,0	3,4	11,9	9,5	-30,8	-31,4
652-55	6,0	24,0	9,6	61,6	13,2	77,0	13,7	66,8	19,4	90,5	12,5	21,2	8,4
	5,4	19,2	7,8	51,5	10,4	54,0	11,5	55,4	15,7	69,5	9,9	22,8	13,5
652	2,8	9,9	6,5	36,6	8,2	39,2	9,3	40,4	13,4	55,8	23,4	27,8	19,3
	2,6	8,7	5,2	30,4	6,7	30,8	7,8	33,3	10,2	42,0	41,4	23,4	16,8

1. In each category the first line refers to total exports while the second line refers to exports to EEC countries

2. From 1981 onwards, the numbers for facon/making-up are included thus the 1981/83 figures are not comparable to other years

Source: ESYE

TABLE 2.7 : TEXTILE INDUSTRY EXPORTS CONTD

Code	1976		1980		1981		1982		1983		% Annual Change		
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol		Val
											80/76	83/81	83/81
653	1,5	7,8	2,1	17,2	2,4	19,1	2,0	12,4	2,7	14,4	8,8	6,1	-13,2
	1,3	5,3	1,8	14,9	1,8	12,6	1,7	9,8	2,3	12,2	8,5	13,0	- 1,6
654	0,1	1,0	0,07	1,5	1,6	11,5	1,8	11,0	2,9	18,1	9,1	34,6	25,4
	0,07	0,5	0,04	0,9	1,1	6,9	1,5	9,5	2,8	14,2	-13,1	59,5	43,4
655	1,5	5,3	0,95	6,4	0,9	7,2	0,7	5,1	0,3	2,3	-10,8	-42,3	-43,5
	1,4	4,5	0,8	5,4	0,7	3,5	0,4	2,7	0,2	1,2	-13,0	-46,5	-41,4
656	0,9	8,7	0,56	7,9	0,6	6,8	0,5	5,3	0,5	5,2	-11,2	- 8,7	-12,5
	0,7	6,5	0,47	6,4	0,5	4,7	0,4	3,8	0,4	3,5	-9,5	-10,6	-13,7
658	2,9	15,4	5,9	42,4	8,3	50,0	9,1	51,0	9,4	43,1	19,4	6,4	- 7,2
	2,4	12,4	4,3	29,9	6,3	35,5	7,0	37,7	7,6	33,8	15,7	9,8	- 2,4
658.3	1,5	6,8	1,9	11,4	3,0	13,8	1,8	9,4	1,8	7,1	6,1	-22,5	-28,3
	1,2	4,8	0,7	2,7	1,5	3,8	0,8	3,1	1,0	3,0	-12,6	-18,3	-11,1
658.4	1,1	7,8	1,3	12,9	2,5	20,4	2,9	22,8	3,0	20,6	4,3	9,5	0,5
	1,0	7,2	1,1	10,1	2,3	17,2	2,6	19,1	2,7	17,8	2,4	8,3	1,7
658.9	0,14	0,65	1,65	14,7	1,7	12,6	1,8	12,9	1,4	8,8	85,3	-9,3	-16,4
	0,10	0,4	1,63	14,4	1,6	11,8	1,6	11,1	1,2	7,1	100,9	-13,4	-22,4
659	6,3	30,9	3,9	24,5	4,6	24,2	3,7	20,7	4,9	22,8	-11,3	3,2	- 2,9
	5,4	26,2	3,2	19,6	3,7	17,4	2,8	14,1	3,7	15,4	-12,3	0	- 6,0

TABLE 2.7 CONTD: TEXTILE INDUSTRY EXPORTS

Volume 000 tonnes Value mn US $

Code	1984		1985		%Annual Change		
	Vol	Val	Vol	Val	Vol		Val
					80/76	85/81	85/81
65	121,6	460,3	110,2	412,5	6,6	0,9	3,9
	103,6	381,6	95,2	348,6	4,8	3,5	0,8
651	85,2	303,3	76,4	268,9	6,8	0,6	4,5
	76,9	270,5	67,8	237,8	5,4	2,2	1,0
652.55	19,7	88,0	18,1	76,1	12,5	8,2	0,3
	14,2	61,4	15,3	62,9	9,9	10,1	3,9
652	14,3	60,3	12,4	50,5	23,4	10,9	6,5
	10,2	42,0	10,4	41,6	41,4	11,6	7,8
653	2,7	11,9	2,5	9,3	8,8	1,0	16,5
	2,4	10,4	2,2	7,7	8,5	5,1	11,6
654	2,3	13,5	2,9	14,7	9,1	16,0	6,3
	1,5	8,2	2,5	12,5	13,1	22,8	16,0
655	0,3	2.3	0,3	1,6	10,8	24,0	31,3
	0,1	0,8	0,2	1,1	13,0	26,9	25,1
656	0,6	4,5	0,5	4,1	11,2	4,4	11,9
	0,5	3,1	0,4	3,1	9,5	5,4	9,9
658	10,5	43,7	10,2	43,4	19,4	5,3	3,5
	8,7	33,4	8,2	32,2	15,7	6,8	2,4
659	4,6	20,8	5,0	20,0	11,3	2,1	4,6
	3,3	13,2	3,5	12,6	12,3	1,4	7,7

Source: ESYE

TABLE 2.8: TEXTILE INDUSTRY IMPORTS [1,2]

Volume 000 tonnes — Value mn US $- Current Prices

Code	1976		1980		1981		1982		1983		% Annual Change		
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol		Val
											80/76	83/81	83/81
65	28,6	128,0	23,2	184,7	45,2	352,5	41,8	321,6	49,8	308,4	-5,1	5,0	- 6,5
	19,0	76,4	12,1	111,4	31,8	262,0	31,6	245,6	34,7	237,3	-10,7	4,5	- 4,8
651	8,3	34,5	7,2	56,1	12,9	79,1	11,3	68,3	14,9	75,1	-3,5	7,2	- 2,5
	7,6	31,7	5,3	44,7	10,3	64,3	9,2	57,7	11,8	63,0	-8,5	7,3	- 1,0
652	4,1	19,0	2,8	24,3	4,6	57,6	4,1	48,5	4,3	38,2	-8,8	-3,8	-18,5
	1,8	6,1	0,9	12,2	3,0	45,1	2,9	29,1	3,0	28,5	-1,2	-0,3	-20,6
653	3,3	20,4	2,8	23,2	7,3	64,3	7,9	67,5	7,3	60,5	-3,8	0,2	- 3,0
	1,8	12,7	1,5	14,2	6,0	54,6	6,8	59,0	6,2	52,2	-4,3	2,0	- 2,3
654	2,5	14,9	1,2	13,0	3,2	34,0	3,2	32,9	3,1	28,4	-16,2	-0,8	- 8,6
	1,4	10,9	0,6	11,5	2,5	31,8	2,6	30,8	2,4	26,4	-18,9	-2,7	- 8,9
655	0,35	2,7	0,39	5,6	2,42	24,7	2,75	29,3	2,7	27,0	2,5	5,5	4,6
	0,31	2,5	0,30	4,7	2,35	23,8	2,57	27,5	2,5	25,3	-1,0	3,7	2,9
656	0,22	2,3	0,25	3,8	0,42	6,3	0,44	6,9	0,28	5,1	3,3	-18,8	- 9,7
	0,2	1,5	0,2	2,5	0,30	4,6	0,27	4,4	0,2	3,4	-1,5	-18,3	-14,1
657	5,4	15,3	4,6	28,3	7,7	60,1	7,5	45,2	7,3	40,4	-4,0	-2,6	-18,0
	4,3	8,5	2,2	15,8	5,3	30,0	5,3	30,2	5,1	28,9	-15,1	-2,0	- 1,8
658	2,4	11,3	2,6	26,0	5,2	22,7	2,8	18,7	7,0	25,9	1,2	16,3	6,8
	0,35	1,0	0,5	3,5	1,5	4,4	1,1	4,2	1,6	3,9	8,7	3,7	- 5,6
659	2,0	2,6	1,4	4,4	1,5	3,7	1,8	4,3	2,9	7,8	-7	37,3	44,4
	1,2	1,5	0,6	2,3	0,5	1,7	0,9	2,7	1,9	5,7	-16,1	91,2	84,4

1. In each cateogory the numbers in the first line refer to total imports while the numbers in the second line refer to imports from the nine EEC member States
2. See Table 11

Source: ESYE

TABLE 2.8 CONTD: TEXTILE INDUSTRY IMPORTS

Volume in 000 tonnes Value mn US $

Code	1984		1985		% Annual Change			
	Volume	Value	Volume	Value	Volume		Value	
					80/76	85/81	85/81	
65	60,0	344,1	64,0	368,7	5,1	9,1	1,1	
	43,0	274,1	48,8	294,9	10,7	11,3	3,0	
651	21,5	103,1	24,5	109,5	3,5	17,4	8,5	
	16,6	85,1	19,4	90,6	8,5	17,1	8,9	
652.55	19,1	164,5	21,3	178,9	8,5	5,0	0,2	
	15,6	143,2	17,7	153,7	11,2	6,3	0,3	
652	5,7	48,9	6,6	53,5	8,8	9,4	1,8	
	4,0	38,3	4,8	41,3	1,2	12,5	2,2	
653	7,4	60,8	8,6	70,7	3,8	4,2	2,4	
	6,4	52,7	7,4	61,1	4,3	5,4	2,8	
654	3,3	30,2	3,4	34,0	16,2	1,5	0,0	
	2,6	28,2	2,8	31,4	18,9	2,9	0,3	
655	2,7	24,6	2,7	20,7	2,5	2,8	4,3	
	2,6	24,0	2,7	19,9	1,0	3,5	4,4	
656	0,3	4,7	0,3	5,0	3,3	8,1	5,6	
	0,2	3,4	0,3	3,8	1,5	0,0	4,7	
658	6,5	21,6	3,7	17,7	1,2	8,2	6,0	
	1,3	4,2	0,9	4,2	8,7	12,0	1,2	
657	8,9	42,8	9,8	48,7	4,0	6,2	5,1	
	6,6	32,5	7,2	35,5	15,1	8,0	4,3	
659	3,7	7,4	4,4	8,9	7,0	30,9	24,5	
	2,7	5,7	3,3	7,1	16,1	60,9	42,9	

Source ESYC

TABLE 2.9: CLOTHING INDUSTRY EXPORTS [1,2]

Volume 000 tonnes Value mn US $- Current Prices

Code	1976		1980		1981		1982		1983		% Annual Change		
											Vol		Val
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	80/76	8 /81	8 /81
84	15,7	198,5	22,1	401,3	29,2	389,9	27,9	455,6	30,3	532,8	8,95	1,9	16,9
	14,7	177,5	20,1	358,7	26,6	354,1	25,8	407,2	28,2	483,9	8,1	2,9	16,9
842	1,1	14,0	2,2	45,3	4,0	45,5	4,2	60,3	3,9	53,6	20,2	-1,2	8,5
	1,0	12,2	1,9	40,0	3,8	43,1	3,5	47,1	3,5	47,4	19,1	-4,2	4,9
843	2,6	31,5	2,4	48,2	6,6	76,2	7,1	101,5	7,4	112,4	-1,6	5,9	21,5
	2,4	27,0	2,1	40,7	6,3	65,8	6,8	93,5	7,1	106,9	-2,9	6,5	27,5
844	0,4	5,3	0,12	1,7	0,54	6,1	0,68	8,6	0,62	8,4	-22,3	7,3	17,6
	0,3	3,8	0,09	1,4	0,54	6,0	0,68	8,5	0,61	8,2	-26,1	6,5	16,9
845	7,2	102,5	8,9	169,9	7,4	120,2	6,6	112,1	7,9	135,6	5,6	2,9	6,2
	6,7	94,4	8,0	151,5	6,9	109,0	6,2	102,0	7,3	122,8	4,4	2,3	6,2
846	2,30	23,0	7,3	103,9	8,5	93,0	7,4	94,8	8,4	106,3	33,5	-0,3	6,9
	2,27	22,4	7,1	98,5	8,2	87,6	7,0	87,0	7,9	93,3	32,7	-1,7	3,2
848.10	0,009	0,33	0,014	1,3	0,176	4,0	0,144	5,6	0,157	6,5	11,7	-5,5	27,7
	0,005	0,16	0,010	1,2	0,169	3,9	0,136	5,0	0,154	6,4	18,9	-4,5	28,2
848.31	0,34	14,8	0,30	24,0	1,3	39,4	1,1	67,3	1,2	104,4	-2,7	-6,4	62,8
	0,28	11,5	0,26	19,7	1,2	34,7	0,76	60,6	0,99	90,6	-1,9	-9,0	61,7

1. See Table 2.7

2. See Table 2.7

Source ESYE

TABLE 2.9 : CLOTHING INDUSTRY EXPORTS

Volume 000 tonnes Value mn US$

Code	1984		1985		Annual change %			
					Vol		Val	
	Vol	Val	Vol	Val	80/76	85/81	85/81	
84	37,4	442,2	37,0	500,4	8,9	5,9	6,4	
	34,7	394,4	32,4	429,1	8,1	5,0	4,9	
842	4,1	50,4	5,4	63,0	20,2	7,8	8,5	
	3,8	46,2	4,2	50,9	19,1	2,5	4,2	
843	8,8	139,4	9,6	148,2	- 1,6	9,8	18,1	
	8,1	124,7	8,6	128,9	- 2,9	8,1	18,3	
844	0,5	5,0	0,3	3,8	-22,3	-13,7	- 11,2	
	0,5	4,8	0,3	3,6	-26,1	-13,7	- 12,0	
845	8,7	136,4	12,2	171,3	5,6	13,3	9,3	
	7,6	116,5	10,6	144,1	4,4	11,3	7,2	
846	15,3	111,0	9,5	114,1	33,5	2,8	5,2	
	14,7	102,2	8,7	101,6	32,7	1,5	3,8	

Source: E.S.Y.E.

TABLE 2.10: CLOTHING INDUSTRY IMPORTS [1,2]

Volume 000 tonnes Value mn US $ _Current Prices

Code	1976		1980		1981		1982		1983		% Annual Change		
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol		Val
											80/76	83/81	83/81
84	0,6	8,7	1,6	31,5	3,5	49,3	3,3	57,7	4,5	63,7	28,6	12,8	13,6
	0,4	7,4	0,65	20,9	2,8	40,2	2,7	47,4	3,8	52,8	10,3	7,7	14,6
842	0,11	1,2	0,44	6,4	0,8	8,9	0,8	13,5	1,0	14,1	41,5	15,3	25,8
	0,1	1,1	0,13	3,8	0,45	5,9	0,6	10,2	0,8	10,1	11,3	31,3	30,4
843	0,045	1,0	0,36	6,7	0,5	7,4	0,8	12,0	1,0	14,2	68,0	39,8	38,5
	0,036	0,9	0,1	3,8	0,47	6,5	0,7	10,7	0,9	12,9	27,8	41,3	40,6
844	0,006	0,1	0,05	0,9	0,05	0,9	0,06	1,4	0,07	2,0	69,0	19,5	49,8
	0,003	0,06	0,014	0,5	0,017	0,5	0,03	1,1	0,04	1,5	47,0	55,3	74,8
845	0,05	1,2	0,2	6,5	0,6	9,9	0,5	12,5	0,55	10,5	39,8	-4,5	2,9
	0,04	1,0	0,1	4,9	0,5	8,3	0,4	10,2	0,48	8,9	64,9	-2,8	3,5
846	0,19	3,2	0,18	6,4	1,14	15,8	0,76	11,6	1,31	15,2	-0,6	7,2	-2,5
	0,18	3,1	0,1	5,0	1,07	14,6	0,7	10,1	1,27	14,1	-13,6	8,9	-1,7

1. See Tabe 2.8

2. See Table 2.7

Source ESYE

TABLE 2.10 CONTD: CLOTHING INDUSTRY IMPORTS

Volume 000 tonnes Value mn.US $

Code	1984		1985		% Annual Change		
	Vol	Val	Vol	Val	Vol		Val
					80|76	85|81	85|81
84	3,2	58,8	3,0	56,5	28,6	- 3,8	3,5
	2,8	50,1	2,8	49,9	10,3	0,0	5,5
842	0,8	11,0	0,6	10,9	41,5	- 6,9	5,2
	0,6	9,2	0,5	9,0	11,3	2,7	11,1
843	1,0	17,8	0,9	18,9	68,0	15,8	26,4
	0,9	16,5	0,8	16,6	27,8	14,2	26,4
844	0,1	4,6	0,07	2,0	69,0	8,8	22,1
	0,06	2,0	0,05	1,7	47,0	31,1	35,8
845	0,4	12,5	0,4	12,3	39,8	- 9,6	5,6
	0,3	10,5	0,4	11,1	64,9	- 5,4	7,5
846	0,9	12,9	1,0	12,4	- 0,6	- 8,1	- 5,9
	0,9	11,9	1,0	11,5	-13,6	- 1,7	- 5,8

Source ESYE

TABLE 2.11: RAW MATERIAL IMPORTS FOR TEXTILES [1,2]

Volume 000 tonnes — Value mn US $ Current Prices

Code	1976		1980		1981		1982		1983		% Annual Change		
	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol	Val	Vol 80/76	Vol 83/81	Val 83/81
263	15,7	24,1	59,2	119,1	40,7	86,3	41,6	70,1	45,6	79,8	39,3	5,8	9,6
	0,03	0,06	0,005	0,02	0,01	0,07	0,03	0,08	0,4	0,6	-36,1	396,7	206,1
266	28,0	43,2	24,4	50,9	25,9	50,1	24,4	47,9	21,6	37,1	-3,4	-8,7	-13,9
	24,7	38,3	20,5	43,4	22,4	43,5	21,7	42,9	19,5	33,4	-4,5	-6,7	-12,4
267	8,0	8,0	7,3	10,1	5,7	8,3	5,1	8,8	4,7	9,3	-2,3	-9,2	5,9
	2,9	3,0	2,1	3,6	2,7	4,8	2,8	6,2	2,9	7,3	-7,8	3,6	23,3
268	20,1	66,4	13,1	68,0	10,7	55,0	10,3	49,8	10,0	39,8	-10,1	-3,3	-14,9
	4,4	16,7	0,9	5,5	1,5	8,9	1,7	9,5	1,5	7,5	-32,7	-2,8	-8,1

TABLE 2.12 : TEXTILE RAW MATERIALS EXPORTED [1,2]

263	35,8	44,5	29,8	41,5	18,9	26,1	26,6	34,6	34,0	49,5	-4,5	34,1	37,7
	7,1	8,1	4,1	2,8	8,0	7,1	9,4	8,5	15,1	17,2	-12,8	37,4	55,6
265	0,7	0,8	3,8	6,3	2,6	3,7	3,1	5,0	5,3	7,7	52,6	42,8	44,2
	0,7	0,8	3,3	5,4	2,5	3,5	2,8	4,2	4,4	5,7	47,3	32,7	27,6
267	0,4	0,2	0,25	0,1	0,6	0,24	-	0,004	0,8	0,38	-12,3	21,8	27,5
	0,3	0,16	0,2	0,06	0,4	0,2	-	-	0,8	0,38	-14,7	37,6	39,1
268	1,5	1,6	0,7	1,1	0,6	1,2	0,5	1,0	0,9	0,9	-16,7	16,6	-13,7
	0,9	1,2	0,5	0,9	0,5	1,0	0,4	0,7	0,7	0,75	-12,6	20,1	-13,2

1. See Tables 2.7 and 2.8

Source ESYE

Chapter 3

EMPLOYMENT: CHARACTERISTICS AND DEVELOPMENT.

3.1 Growth of employment and size of production units.

Employment in the twenty years to 1980 grew steadily in the Clothing and textile industries.Since that time up to 1985 there has been a significant fall off in the Textile industry and stagnation in the Clothing industry. Available statistics[1] for 85-86 show total employment for the two industries at 143000. This figure includes all the employed regardless of whether they are salaried employees, day-workers, managers or self-employed.

The contribution of the two industries to overall employin the manufacturing sector is around 20%, with an allocation of 55 and 45% for Textiles and Clothing respectively. This ratio has remained relatively unchanged for the last 20 years.

Table 3.1 shows available employment data to three-figure level for the period 1970-80 and by sub-sector. Table 3.2 shows the type of employment for the census year of 1978.

Employment in the Textile industry rose from 56400 in 1970 to 76800 in 1980 (Table 3.1).80% of this increase was mainly from the cotton and knitwear branches. These subsectors are also the largest contributors to textile industry employment, 32% and 27% respectively. During the

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same period, the following sub-sectors also showed substantially increased employment levels; synthetic and non-continuous fibres for thread- and carpet-weaving. The dyeing and finishing sub-sector showed a relatively smaller increase. The remaining three textile sub-sectors reduced their employment levels, particularly in the wool sub-sector.

Another development of the 70s was the drop in contribution to employment of the smaller production units (0-9 staff) from 21.1% of overall sector employment in 1970 to 14.8% in 1980. The absolute number of production units also fell slightly in the same period from 5052 to 5928, while the average size of production unit increased significantly in the cotton and knitting sub-sectors (Table 3.1).

In the more recent 1980-85 period, as shown in Table 3.3, overall employment in the Textile industry fell dramatically up until 1984 due to some of the largest companies registering as 'troubled'. 1985 however was a year of recovery, with an increase of 5000 jobs.

In the Clothing industry employment almost doubled in 1970 to 1980, from 45000 to 63500 (Table 3.1). This growth continued but at a slower rate reaching 69000 in 1985. (Table 3.3). A large proportion of jobs in the sector (15-20%) relate to making-up production (facon) for third parties, mainly for other European firms particularly W. Germany.

One of the features of the Clothing industry is the large number of tiny units. More specifically, those employing 0-9 people were responsible for 75% of employment in the sector in 1970. But by 1980 however, this had fallen to 42% and the average size of unit had increased from 2.5 to 3.9 people. This is considerably smaller than the average for the manufacturing sector overall, which was 5.1 people in 1980. At the same time, the absolute number of units fell dramatically, either due to the exit of many of the small firms from the industry or due to their merging into larger units in order to better deal with the increasing competition.

Limited information is available on employment statistics in each sub-sector of the Clothing industry and this concerns the year 1978 (Table 3.5). These statistics indicate that the womens' and childrens' branches are responsible for 43% of the employment,followed by mens' clothing at 34.5% and underwear at 16.5%.

3.2 Male/female employment statistics and status.

The number of self-employed in the textile industry is low, around 10%, in comparison with other branches of the manufacturing sector. This is due to the fact that the industry is dominated by large, vertically integrated units. Self-employment in the manufacturing sector overall is at around 25% (table 3.4). The wool and knitwear branches have the highest incidence of self-employment at 17 and 14% respectively, while the cotton and synthetic and non-continuous fibre branches have the lowestat 4%.

The Clothing industry has a totally different employment structure because of the large number of small units. Thus, the self-employed account for 30% of the industry's employment which is a greater proportion than for the manufacturing sector overall (Table 3.5). The largest concentration is in the mens' sector (48%) and the smallest in the womens' and childrens' sector (20%).

In both industries women account for most jobs (Tables 3.4 and 3.5). In Textiles, women fill 56% of jobs and in Clothing 67%. The figure for the manufacturing sector overall is 30%. The dyeing and finishing and mens' clothing sectors have a much higher incidence of men in employment; 68% and 54% respectively.

3.3 Employment statistics by profession

From the available employment statistics on individual professions laid out in Table 3.6, we can see that the main skills for the two industries (which are thread-makers, weavers knitters and dyers for Textiles and Cut-and-Sew for Clothing), are exclusively related to these industries. Mobility from one branch to the other is severely limited even within the two industries and is almost non-existent between industries in other manufacturing sectors. According to 1981 figures, the numbers employed in the above-mentioned textile sectors represent 75% of sector employment, while the corresponding figure for the Clothing industry is 83%. The high degree of associationof these professions with the Clothing and Textile industries, underlines the difficulties involved

in finding jobs in other branches of the manufacturing sector.This also emphasises the need for suitable vocational training and retraining programmes which relate to skills needed within the sector as well as contributing to the possibility of professional mobility into other sectors, within the framework of a policy of restructuring the Textile industry.

3.4 Working conditions

The number of weekly working hours along with pay levels in each industry are basic indicators of working conditions and their development over time.

In the period 1970-85 the number of paid working hours (men and women) fell significantly in both industries. This was more evident in Textiles where 45 hours in 1970 dropped to 40 hours in 1980 and 38.1 hours in 1982 (by 1985 this had again increased to 39.5 hours). These developments were relative to the industrial sector overall. The changes were less dramatic in the Clothing and Shoe sector where 41.5 hours in 1970 dropped to 38.4 in 1980. 37.1 hours in 1982 and rose again in 1985 to 39.1 hours. Womens' working hours are around two less than the mens' in both industries.

Hourly pay in Textiles in 1970 was 4.7% higher than overall industry average. By 1981 the reverse was true; textile pay was 9% lower than industrial average while by 1982 this had stabilised at around the average level.

The Clothing industry pays less than most industries. In 1970 hourly pay was 2% less than industrial average,by 1981 the difference ahd widened to 25%, dropping to 19% in 1985.

Womens' pay tends to be generally lower than mens' in every sector during the 15-year period measured, although the gap appears to be closing in recent years. Womens' hourly pay in Textiles in 1970 was at 68% of the level of mens' pay, 71% in 1981 and 83% in 1985. In the Clothing industry the levels were 72% in 1970-81 and 82% in 1985. In both industries the gap seems to be closing faster than that of the industry average where the corresponding figures are 69% in 1970 and 78% in 1985.

Another characteristic of working conditions is the rule that women and young people are not allowed to work at night (night shift 10pm-6am). Working mothers are allowed to work one less hour every day for 12 months after the birth of a baby. Finally, night shift workers are paid 25% more.

TABLE 3.1: GROWTH OF GREEK TEXTILE BUSINESSES AND RELATED EMPLOYMENT IN THE 1970s

	SECTORS	Number of Units				Employment 000 people			
		1970		1980		1970		1980	
		Total	%MB	Total	%MB	Total	%MB	Total	%MB
	TEXTILES	5.052	84,7	5.028	80,2	56,4	21,1	76,8	14,8
231	Wool Yarns and Fabrics	1.266	88,1	1.250	88,4	12,7	27,2	9,2	32,5
232	Cotton Yarns and Fabrics	685	83,4	689	68,8	14,9	12,1	24,8	6,5
233	Synthetic Cont.Fibre Yarns&Fabs	273	73,9	167	56,7	5,5	14,3	4,0	10,4
234	Syn.Non-Cont.Fibre Yarns & Fabrics	(2)	(2)	173	70,6	(2)	(2)	7,2	3,7
235	Hard Fibres Yarns & Fabrics	144	77,7	12	58,3	2,2	13,5	0,6	1,2
236	Knitwear	1.971	87,7	2.014	82,2	14,1	29,2	20,6	20,1
237	Dyeing,Finishing	383	87,5	390	84,6	3,8	14,9	4,1	23,6
238	Thread-making	27	81,5	119	69,7	1,1	20,1	2,7	11,7
239	Other activities	299	85,3	214	78,5	2,1	39,8	3,7	18,8
	CLOTHING	17.847	97,7	16.204	93,3	45,1	75,8	63,5	41,6
243	Clothing made from fabrics	16,485	97,6	14.657	92,9	41,6	74,8	58,0	39,6
244	Various items from fabrics	1.372	98,5	1.547	96,5	3,5	88,5	5,5	62,8
	TOTAL TEXTILES/CLOTHING	22.899	94,9	21.232	90,2	101,5	45,4	140,3	30,0

1. %MB= % contribution of Small Businesses which include units employing 0-9 people
2. For 1970, Sector 234 figures are included in Sector 238

Source: Annual Industrial Survey 1970 and 1980 ESYE

TABLE 3.2: NUMBER OF PRODUCTION UNITS AND NUMBERS EMPLOYED IN THE CLOTHING AND TEXTILE INDUSTRIES (1978)

	No. of Units	Nos. Employed	Average Size
SECTOR 23: TEXTILES	4 156	73 223	17,6
231 Wool fabrics and yarns	1 090	14 376	13,1
Yarn Mills	403	5 970	14,8
Weaving mills	687	8 405	12,2
232 Cotton fabrics, yarns	558	21 919	39,2
Yarn mills	138	15 114	109,5
Weaving mills	420	6 805	16,2
233 Continuous synthetic fabrics,yarns (nylon) and artificial silk	125	2 834	22,6
Yarn mills	24	590	24,5
Weaving mills	101	2 245	22,2
234 Non-Continuous synthetic fabrics,yarns	124	4 364	35,1
Yarn mills	27	2 289	84,7
Weaving mills	97	2 075	21,3
235 Jute,Linen,Canvas yarns and fabrics	13	630	48,4
236 Knitwear	1 609	17 224	10,7
237 Dyeing,Finishing	346	5 203	15,0
238 Thread-making	96	3 159	32,9
239 Other activities	195	3 514	18,0
SECTOR 24: CLOTHING	13 835	60 013	4,3
243 Clothing	12 556	55 867	4,4
244 Items fabric items but not clothing	1 279	4 146	3,2
SECTOR TOTALS	17 991	133 236	7,4

Source: Industrial Census 1978 ESYE

TABLE 3.3: GROWTH OF EMPLOYMENT IN THE CLOTHING AND TEXTILE INDUSTRIES, MALE/FEMALE AND WORKING STATUS

	EMPLOYED, BOTH SEXES (No. of People)			% Men		% Women	
	Total	Salaried	%	Total	Salaried	Total	Salaried
23 TEXTILES							
1980	76 837	69 465	90,4	43,8	42,3	56,2	57,7
1981	76 757	69 323	90,3	44,1	44,3	55,9	56,7
1982	73 692	64 605	87,7	44,3	44,4	55,7	55,6
1983	70 750	60 208	85,1	44,6	45,4	55,4	54,6
1984	69 542	60 171	86,5	43,9	43,6	56,1	56,4
1985	74 468	62 860	84,5	45,2	45,8	54,8	54,2
243&244 CLOTHING							
1980	63 481	44 091	69,5	33,0	20,0	67,0	80,0
1981	63 884	44 441	69,6	33,0	20,0	67,0	80,0
1982	66 012	43 317	65,6	35,0	24,0	65,0	76,0
1983	68 210	42 222	61,9	37,0	28,4	63,0	71,6
1984	66 898	42 480	63,5	36,0	24,7	64,0	75,3
1985	68 946	44 540	64,6	35,2	25,7	64,8	74,3

Source: Annual Industrial and Labourforce Surveys ESYE

TABLE 3.4: 1978 MALE/FEMALE EMPLOYMENT IN TEXTILES, BY PROFESSION AND WORKING STATUS

	TEXTILE SUBSECTORS	EMPLOYED, BOTH SEXES			% MEN		% WOMEN	
		Total	Salaried	%	Total	Salaried	Total	Salaried
23	TEXTILES *	79.218	71.482	90,2	43,6	41,3	56,4	58,7
		(33.129)	(29.959)	90,4	43,2	40,7	56,8	59,3
231	Wool yarns & fabrics	15.405	13.254	86,0	44,2	40,9	55,8	59,1
232	Cotton yarns & fabrics	22.873	22.038	96,3	49,9	48,9	50,1	51,1
233	Syn.Cont.fibre yarns&fabs.	3.099	2.897	93,5	51,2	49,3	48,8	50,7
234	Non-cont "" "" ""	4.743	4.564	96,2	51,1	50,0	48,9	50,0
235	Hard fibre yarns & fabrics	621	613	98,7	38,8	38,2	61,2	61,8
236	Knitwear	19.793	16.442	83,1	26,9	21,1	73,1	78,9
237	Dyeing, Finishing	5.477	4.883	89,1	68,2	67,5	31,8	32,5
238	Thread-making	3.461	3.315	95,8	36,8	34,7	63,2	65,3
239	Other activities	3.746	3.476	92,8	44,7	42,3	55,3	57,7
23	INDUSTRY TOTAL*	689419	514.441	74,6	70,6	65,7	29,4	34,3
		(284868)	(218.843)	76,8	70,4	66,3	29,6	33,7

* All figures relate to employment at 30.9.1978
Figures in brackets denote Area around the Capital

Source: Instrial Survey 1978 ESYE

TABLE 3.5: 1978 MALE/FEMALE EMPLOYMENT IN CLOTHING, BY PROFESSION AND WORKING STATUS

	EMPLOYED, BOTH SEXES			% MEN		% WOMEN	
	Total	Salaried	%	Total	Salaried	Total	Salaried
24 CLOTHING - SHOES *	90.096	60.419	67,1	42,3	26,5	57,7	73,5
	(42.502)	(28.875)	67,9	44,8	33,5	55,2	66,5
243 CLOTHING *	66.686	46.427	69,6	32,7	16,4	67,3	83,6
	(28.433)	(19.009)	66,9	34,3	19,7	65,7	80,3
243.1 Mens' Innerwear	23.011	12.026	52,3	53,5	24,0	46,5	76,0
243.2 Womens'& Childrens' Innerwear	28.498	22.949	80,5	18,9	12,4	81,1	87,6
243.3 Clothing from waterproof fab. Plastic etc.	678	487	71,8	30,2	16,8	69,8	83,2
243.4 Items made from fur etc	1.347	856	63,1	55,6	47,9	44,4	52,1
243.5 Special Outerwear	1.161	893	76,9	23,9	13,0	76,1	87,0
243.6 UNderwear	11.001	8.605	78,2	22,6	13,o	77,4	87,0
243.7,8,9, Various items	990	611	61,7	40,5	25,2	59,5	74,8
244 Items made fromfabric, but not Clothing	5.105	2.762	54,1	58,7	50,7	41,3	49,3
23 + 243 TEXTILES - CLOTHING	145.904	117.909	80,8	38,6	31,5	61,4	68,5
	(61.562)	(48.968)	79,5	39,1	32,6	60,9	67,4
23 INDUSTRY TOTAL *	689.419	514.441	74,6	70,6	65,7	29,4	34,3
	(284.868)	(218.843)	76,8	70,4	66,3	29,6	33,7

* Figures are at 30.9.78 and figures in brackets relate to Athens area

Source: Industrial Survey 1978 ESYE

TABLE 3.6: EMPLOYMENT IN BOTH TEXTILE AND CLOTHING INDUSTRIES, BY BASIC PROFESSION (1971-1981)

Profession / SECTORS	TEXTILES				CLOTHING			
	1971		1981		1971		1981	
	People	%	People	%	People	%	People	%
03. Designers, Assistant Mechanics	68	0,1	400	0,6	4	-	66	0,1
11. Accountants (Tertiary Educated)	268	0,4	666	1,0	64	0,1	200	0,2
16. Sculpturers, Painters, Artists	76	0,1	333	0,5	140	0,2	266	0,3
21. Directors and Senior Business Managers	620	1,0	1 933	2,9	168	0,2	2 466	2,8
33. Book-keepers	1 308	2,1	2 066	3,1	392	0,5	1 333	1,5
39 Office Workers	792	1,3	3 066	4,5	952	1,2	1 866	2,1
55. Construction Workers	388	0,6	1 000	1,5	84	0,1	200	2,3
56. Launderers, Dry Cleaners, Pressers	168	0,3	733	1,1	428	0,6	2 800	3,2
75. Thread-makers, Weavers, Knitters, Dyers	46 064	73,4	47 400	70,0	148	0,2	666	0,8
79. Sewing Machinists	1 072	1,7	2 466	3,6	74 252	96,0	71 266	82,0
84. Welding, Machinery assembling	1 380	2,2	2 400	3,5	76	0,1	400	0,5
85. Electricians, Welding Electricians	392	0,6	600	0,9	24	-	66	0,1
97. Machinery Operators Transport workers	600	1,0	1 460	2,2	472	0,6	1 200	1,4
98. Lorry Drivers	240	0,4	733	1,1	44	0,1	733	0,8
Other Professions	9 300	14,8	2 463	3,6	128	0,2	3 726	4,3

Note: In certain Clothing and Shoe Industry subsectors it was not possible to separate Figures relating to Clothing alone, therefore total is shown.

Source: ESYE Labourforce survey 1981 and Population Census-Production units 1971

TABLE 3.7: EMPLOYMENT IN THE CLOTHING AND TEXTILE INDUSTRIES, BY REGION AND BY PROFESSION (1981)

Region \ Profession	Thread-makers, Weavers, Knitters, Dyers (Code 57)	Sewing Machinists for Mens, Womens & Childrens Carpet Technicians (75)
1. East Mainland and Islands	23.398	33.930
2. Central & West Macedonia	10.400	22.465
3. Peloponnese & W.Mainland	4.133	5.466
4. Thessaly	4.666	5.132
5. East Macedonia	466	4.866
6. Crete	2.199	1.998
7. Epirus	1.800	2.265
8. Thrace	599	1.866
9. F.E. Aegean	533	1.333
10 COUNTRY TOTAL		
a) Sectors Total	48.194	77.323
b) Textiles	47.400	2.466
c) Clothing	666	71.266
d) Other Sectors	128	3.591

Source: ESYE Labourforce Survey 1981

Chapter 4

REGIONAL DEVELOPMENT

4.1 Regional developments in the Textile industry

The textile industry is one of the few in the manufacturing sector with a relatively high proportion of decentralised production. Having said this,it has not developed smoothly at a regional level in the same way as long-term developments in other countries.

This statement is supported upon examination of certain characteristics of the sector at regional level. Starting with employment statistics and number of production units it can be seen that most of the sector's activity is clustered around the country's urban areas. In order of importance these are; Athens, Piraeus, Salonica, Patras, Volo-Larissa, Thebes, Heraklion and Kavala. Historically, settlement of most production units is determined by proximity to commercial and purchasing centres as well as sources of raw materials and available workforce at a regional (local) level. Decentralisation has also in part been encouraged during the last decade by incentives for industry. These were structured on a scale so as to be more beneficial for underdeveloped (problem) areas and this seems to have further assisted decentralisation. In certain activities such as the cotton industry a significant number of units have been set up in frontier outposts such as Thrace and the islands in the Eastern part of the Aegean. The highest degree of decentralisation

however, is to be found in a range of textile sub-sectors such as; yarn-making, weaving, dyeing and finishing of cottons towards the cotton-growing areas of Thessaly and Macedonia. Vertical integration of the production process influenced these developments greatly, from the yarn-making stage (or even cotton-ginning) to weaving and finishing. This helped to 'depressurise'the Athens area towards a more balanced distribution around the capital and the islands. The wool industry continues to concentrate its production around the larger ports (Athens-Piraeus, Volos and Salonica), since it is largely dependent on imported raw materials.

Despite the movement to decentralise the Textile industry which began in 1963, there is still a concentration of activity in the east part of the mainland and islands where the pole of attraction is the greater Athens area. According to the 1978 census the East mainland and Islands region accounts for more than 50% of textile activity[1]. More specifically, these areas still account for 58% of employment in the sector, 53% of horsepower (although the figures for 1963 were higher; 65% and 68% respectively). Based on these criteria the sector is ranked 9th in regional development out of the 20 branches of the manufacturing sector, for the East mainland and Islands region.

1.Regional statistical data on the manufacturing sector is found in the industrial censuses which are carried out every 5 years. The latest figures refer to 1978 because the results of the last census carried out in 1983 have not yet been published.

The tables at the end of this chapter lay out the regional structure of the sector. These relate to the changes over time of certain basic characteristics such as number of production units, average annual employment, horsepower, average size of textile units in 9 regions for the period 1963-78. Examination of this information brings the following observations to light;

a) the number of production units in the industry grew significantly for the whole country as well as in each individual region, with the exception of Thrace and the North-East Aegean which fell.

b) Average annual employment levels also grew for the whole country as well as in almost all regions. Again the exception is the North-East Aegean.

c) Sector horsepower capacity increased significantly both for the country and in each region except for the one previously mentioned, but this time with a smaller decrease than that referred to in a) and b). These developments point to technological and production method improvements in all areas.

d) The average size of production units grew to a greater or smaller extent in all regions. The country average was at 15.5 employees in 1978 compared to 12.5 in 1963.

e) The relative importance of textile activity in each of the 9 regions has shifted over time. However, the East mainland and Islands region (mainly Athens area) as well as Central and West Macedonia remain the regions to whom textile activity is the most important throughout the period examined. Moreover, despite the reduction of its share over time, the East mainland and Islands region

continues to concentrate 50% of industry activity by whichever criterion. In addition, this region together with Macedonia contain the largest production units. The second most important region; Central and West Macedonia along with Thessaly increased their contribution to sector employment and horsepower capacity.

f) The importance of the Textile industry to the manufacturing sector at regional level should also be noted. The proportion of units to the country's overall manufacturing units rose from 3.7 to 3.9% in 1978. The main increases are in Central and West Macedonia and Thessaly. The industry's contribution to employment remained relatively unchanged; 11.9% in 1963 and 11.7% in 1978. At regional level however there were a number of shifts: N.E. Aegean, E. mainland and Islands and Central and West Macedonia fell significantly while other areas increased their share. Finally, with regard to horsepower capacity most areas exhibited healthy growth which is an indicator of up-dating and improvement of production methods and to a greater extent than that of the manufacturing sector overall.

g) Upon examination of regional indices in job specialisation, it can be seen that Thessaly is the only area out of the 9 which increased its specialisation in textiles (to 1.49 on the index in 1978). The East mainland, Central and West Macedonia and the Peloponnese areas have maintained the same level of specialisation as the country average while in the 5 remaining areas Textiles constitute a very small part of specialised employment skills in the overall manufacturing sector of the area.

h) If we look at branches of the Textile industry in terms

of professional skills, there are significant regional differences in structure (Table 4.1). The area around Athens has a high concentration of the following activities; knitting, yarn-making and weaving of synthetics and wools. There is a relatively low concentration of dyeing and finishing activities and cotton yarn-making and weaving, as these are clustered in the following areas: Macedonia, Thessaly and the Peloponnese.

4.2 Regional developments in the Clothing industry

The geographical distribution of production units in Clothing is more evenly spread not only when compared to Textiles but also in relation to all other branches of manufacturing. There are no available census statistics which can permit examination on the same basis as the Textile sector except for the Clothing and Shoe sector as a whole (Table 4.7). However Tables 4.5 and 4.6 which refer to the regional distribution of basic industry characteristics for 1969and 1978, have also classified the country into 9 regions similar to those previously mentioned.

According to the 1978 census clothing production units continue to be clustered on the Greek mainland, particularly around Athens. Since 1969 however, employment levels in the mainland area fell to 46.6% in 1978 from 55% in 1969. During the same period the Macedonian region increased its share from 22% in 1969 to 33% in 1978, and the Thrace region from 1.4% to 2.9%. These developments are even more significant when taking into account the impressive growth rates in employment for the country overall

(65%). The only regions to reduce their employment levels were the Ionian and Aegean islands.

At the same time as the rise in employment levels, there has been a drop in the number of production units from 16480 in 1969 to 14729 in 1978 resulting in a doubling of the average unit size from 2.4 people to 4.4 people. The largest units are based in Thrace and Macedonia.

The industry's horsepower capacity also showed impressive increases over the whole of the country and in each region. Specifically, this grew from 7500 HP in 1969 to 41000 HP in 1978. These developments, combined with the growth in production unit size indicate a substantial improvement in technology levels and production methods used in the industry.

During the 1969-78 decade the Clothing industry's share of manufacturing employment also grew, from 7.8% in 1969 to 9.6% in 1978. Even more impressive however, were the regional increases in Macedonia from 8.5% to 14.4% in the same period and in Thrace from 7% to 15.7%.

Finally, examination of job specialisation indices for the Clothing and Footwear sector shows that the following regions appear to be more specialised: Thrace, Central, West and East Macedonia (the 1978 index for the three regions is between 1.25 and 1.41). The East mainland, Thessaly and North-East Aegean regions have the same level of specialisation as the rest of the country (approx =1.0).

The Peloponnese and Crete regions are more or less average while in Epirus the importance of the sector is much lower compared to other regions.

TABLE 4.1: NUMBERS EMPLOYED IN TEXTILES, BY REGION AND BY PROFESSION (1973)

Tariff Code	Sectors \ Regions	Total Country	Athens Area	Rest of Mainland Greece	Pelopónnese	Ionian Islands	Epirus	Thessaly	Macedonia	THrace	Aegean Islands	Crete
231.	Wool yarns&Fabric	17.215	9.298	2.360	593	20	323	2.011	2.375	59	82	154
232	Cotton yarns & fabric	19.171	6.619	3.848	2.598	-	16	1.388	3.813	80	590	220
233	Synthetic cont. yarns & fabrics	5.324	3.195	507	129	-	-	38	1.247	81	127	-
234	Non-Cont.Syn. yarns & fabrics	682	57	-	-	285	-	-	341	-	-	-
235	Hard fibre yarns & fabrics	2.693	2.110	60	11	-	-	2	468	-	-	43
236	Knitwear	16.454	10.076	940	1.138	18	54	255	3.687	114	72	99
237	Dyeing,Finishing	3.853	1.873	136	649	-	40	478	642	2	22	11
238	Thread-making	297	112	4	4	-	-	4	139	-	3	31
239	Other activities	2.670	1.320	125	74	135	204	56	511	60	161	24
23	TOTAL TEXTILES	68.419	34.659	7.982	5.196	458	637	4.232	13.221	396	1057	582

Source: ESYE Industrial Survey 1973

NOTE

The regions referred to in Tables 4.2-4.7 are the following:

1. East Mainland and Islands:	Mainland Greece apart from the Mayoralties of Aitoloäkarnania and the Cyclades.
2. Central and West Macedonia:	Macedonia, excluding East Macedonia.
3. Peloponnese and West Mainland:	Peloponnese and Mayoralties of Aitoloäkarnania and the Cyclades, Kefalonia and Zante.
4. Thessaly:	Thessaly
5. East Macedonia:	Mayoralties of Kavala, Serres and Drama.
6. Crete	Crete
7. Epirus	Epirus and the Mayoralties of Corfu and Lefkada.
8. Thrace	Thrace
9. North East Aegean	Aegean islands, exc. Cyclades.

TABLE 4.2: TEXTILES, REGIONAL BREAKDOWN IN NUMBERS OF PRODUCTION UNITS, NUMBERS EMPLOYED AND CONTRIBUTION TO PRODUCTION (1978)

REGION	BREAKDOWN OF SECTOR (Absolute Nos)			BREAKDOWN OF SECTOR (%)				% CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING, BY REGION		
	K	A	HP	A/K	K	A	HP	K	A	HP
1.E.Mainland &Islands (Attiki area)	2.664 (2.252)	45.288 (33.020)	262.206 (135.890)	17,0 14,7	52,8 (44,6)	57,8 (42,1)	52,7 (27,3)	4,6 (4,8)	12,2 (11,7)	12,1 (13,9)
2 Central & W. Macedonia	1.067	16.275	102980	15 ,3	21,1	20,8	20,7	4,4	12,8	11,8
3.Peloponnese &W.Mnl'd	390	7.216	54.493	18,5	7,7	9,2	11,0	2,8	12,2	11,6
4.Thessaly	434	5.836	52.860	13,4	8,6	7,4	10,6	5,3	15,5	11,4
5.East Macedonia	94	1.084	4.418	11,5	1,9	1,4	0,9	1,8	5,0	2,1
6.Crete	126	559	1.149	4,4	2,5	0,7	0,2	1,9	3,1	1,0
7.Epirus	182	1.201	15.535	6,6	3,6	1,5	3,1	3,8	8,5	16,1
8.Thrace	63	507	2.656	8,0	1,2	0,6	0,5	1,8	4,3	3,5
9.N.E.Aegean	29	412	836	14,2	0,6	0,5	0,2	0,6	3,8	1,5
COUNTRY TOTAL	5.049	78.378	497.133	15,5	100,0	100,0	100,0	3,9	11,7	11,0

Source: ESYE 1978 Industrial Census

k=No. of Production Units, A=No. Employed, A/K= Average Size of Production Unit, HP= Horsepower

TABLE 4.3: TEXTILES, REGIONAL BREAKDOWN IN NUMBERS OF PRODUCTION UNITS, NUMBERS EMPLOYED AND CONTRIBUTION TO PTODUCTION (1973)

REGIONS	BREAKDOWN OF SECTOR (Absolute Nos)				BREAKDOWN OF SECTOR (%)			% CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING		
	K	A	HP	A/K	K	A	HP	K	A	HP
1. E.Mainland &Islands	2.637	43.064	153.370	16,3	51,9	62,9	61,0	4,9	12,4	7,0
2. Central & W.Macedonia	1.082	12.483	53.212	11,5	21,3	18,2	21,2	5,0	11,8	8,0
3. Peloponnese & W.Mnl'd	416	5.490	17.387	13,2	8,2	8,0	6,9	2,9	10,6	5,4
4. Thessaly	424	4.231	20.776	10,0	8,4	6,2	8,3	5,1	13,1	8,9
5. East Macedonia	97	736	1.483	7,6	1,9	1,1	0,6	2,1	5,0	1,6
6. Crete	100	583	842	5,8	2,0	0,9	0,3	1,5	3,4	1,1
7. Epirus	205	1.046	2.553	5,1	4,0	1,5	1,0	4,2	7,7	4,5
8. Thrace	55	395	999	7,2	1,1	0,6	0,4	1,8	5,0	2,1
9. N.E.Aegean	60	389	764	6,5	1,2	0,6	0,3	1,2	3,1	1,6
COUNTRY TOTAL	5.076	68.417	251.386	13,5	100,0	100,0	100,0	4,2	11,3	6,7

Source: ESYE 1973 Industrial Survey

TABLE 4.4: TEXTILES, REGIONAL BREAKDOWN IN NUMBER OF PRODUCTION UNITS, NUMBERS EMPLOYED AND CONTRIBUTION TO PRODUCTION (1963)

REGIONS	BREAKDOWN OF SECTOR Absolute Numbers				BREAKDOWN OF SECTOR %			% CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING		
	K	A	HP	A/K	K	A	HP	K	A	HP
1. E.Main.&Islands	2286	36181	74038	15,8	51,2	64,7	59,7	4,9	14,1	6,7
2. Central & West Macedonia	726	9064	25838	11,9	17,1	16,2	20,9	4,0	12,8	4,7
3. Peloponnese & W.Mainland	465	5148	14899	11,1	10,4	9,2	12,0	2,5	9,9	5,4
4. Thessaly	379	2185	4240	5,8	8,5	3,9	3,4	4,6	9,0	1,7
5. E. Macedonia	101	638	1176	6,3	2,3	1,2	0,9	1,7	3,7	2,7
6. Crete	95	523	496	5,5	2,1	0,9	0,4	1,2	3,0	0,7
7 Epirus	149	974	1830	6,5	3,3	1,7	1,5	2,5	8,4	4,2
8. Thrace	83	307	493	3,7	1,9	0,6	0,4	2,3	3,7	1,7
9. N.E.Aegean	145	896	958	6,2	3,2	1,6	0,8	2,2	6,4	1,6
COUNTRY TOTAL	4465	55916	123967	12,5	100,0	100,0	100,0	3,7	11,9	5,1

Source: ESYE 1963 Industrial Census

TABLE 4.5: CLOTHING, REGIONAL BREAKDOWN IN NUMBER OF PRODUCTION UNITS, NUMBERS EMPLOYED AND CONTRIBUTION TO PRODUCTION (1978)

REGION	SECTOR BREAKDOWN Absolute Numbers				SECTOR BREAKDOWN %			%CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING		
	K	A	HP	A/K	K	A	HP	K	A	HP
1. Mainland&Evvoia	7.483	30.074	16.547	4,0	50,8	46,6	40,4	12,7	8,0	0,8
(Attiki area)	6.526	27.732	15.511	4,2	44,3	43,0	37,8	13,8	9,8	1,6
2. Macedonia	3.769	21.459	16.407	5,7	25,6	33,3	40,0	12,7	14,4	1,5
3. Peloponnese	941	4.365	3.736	4,6	6,4	6,8	9,1	8,4	8,4	0,9
4. Thessaly	773	3.730	1.798	4,8	5,2	5,8	4,4	9,5	9,9	0,4
5. Ionian islands	121	190	28	1,6	0,8	0,3	0,1	5,2	3,6	0,1
6. Crete	541	844	197	1,6	3,7	1,3	0,5	8,0	4,7	0,2
7. Epirus	253	720	775	2,8	1,7	1,1	1,9	7,8	7,0	1,0
8. Thrace	315	1.859	1.041	5,9	2,1	2,9	2,5	9,0	15,7	1,4
9. Aegean Islands	583	1.266	457	2,4	3,6	2,0	1,1	10,2	9,2	0,6
COUNTRY TOTAL										
24 CLOTHING-SHOES	21.926	87.284	67.164	4,0	148,9	135,3	163,9	17,0	13,0	1,5
243 CLOTHING	14.729	64.506	40.986	4,4	100,0	100,0	100,0	11,4	9,6	0,9

Source: ESYE 1978 Industrial Survey

TABLE 4.6: CLOTHING, REGIONAL BREAKDOWN IN NUMBER OF PRODUCTION UNITS, NUMBERS EMPLOYED AND CONTRIBUTION TO PRODUCTION (1969)

REGION	BREAKDOWN OF SECTOR Absolute Numbers				BREAKDOWN OF SECTOR (%)			% CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING		
	K	A	HP	A/K	K	A	HP	K	A	HP
1.Mainland & Evvoia	7.376 5.999	21.461 19.358	4.944 4.860	2,9 3,2	44,8 36,4	54,8 49,5	65,6 64,4	14,1 14,6	7,7 8,3	0,5 0,8
2.Macedonia	4.002	8.747	1.818	2,2	24,3	22,3	24,1	14,2	8,5	0,4
3.Peloponnese	1.476	2.980	282	2,0	9,0	7,6	3,7	11,9	7,0	0,1
4.THessaly	1.032	1.921	362	1,9	6,3	4,9	5,5	12,5	7,5	0,3
5.Ionian Islands	167	267	3	1,6	1,0	0,7	-	6,1	4,8	-
6.Crete	804	1.257	28	1,6	4,9	3,2	0,4	11,2	7,6	0,05
7.Eprius	325	505	15	1,6	2,0	1,3	0,2	10,0	6,6	0,05
8.Thrace	425	555	15	1,3	2,6	1,4	0,2	12,5	7,0	0,05
9.Aegean Islands	871	1.338	61	1,5	5,3	3,4	0,9	12,3	8,6	0,1
COUNTRY TOTAL										
24 CLOTHING-SHOES	28.249	62.232	18.532	2,2	171,4	159,0	283,3	22,7	12,4	0,9
243 CLOTHING	16.480	39144	7.542	2,4	100,0	100,0	100,0	13,2	7,8	0,4

Source: ESYE 1969 Industrial Census

TABLE 4.7 : REGIONAL BREAKDOWN IN CLOTHING AND FOOTWEAR INDUSTRIES, BY NUMBER OF PRODUCTION UNITS EMPLOYMENT AND CONTRIBUTION TO PRODUCTION (1978)

REGION	BREAKDOWN OF SECTOR Absolute Numbers				BREAKDOWN OF SECTOR %			% CONTRIBUTION OF SECTOR TO OVERALL MANUFACTURING		
	K	A	HP	A/K	K	A	HP	K	A	HP
1. Mainland & Evvoia	10.719	44.266	30.347	4,1	48,9	50,7	45,2	18,5	11,9	1,4
	(9.515)	(41.538)	(28.612)	(4,4)	(43,4)	(47,6)	(42,6)	(20,1)	(14,7)	(2,9)
2. Macedonia	4.556	21.797	21.111	4,8	28,8	25,0	31,4	18,7	17,1	2,4
3. Peloponnese	1.884	6.046	4.910	3,2	8,6	6,9	7,3	13,6	11,1	1,0
4. Thessaly	1.119	4.542	2.669	4,1	5,1	5,2	4,0	13,7	12,1	0,6
5. Ionian Islands	921	4.290	4.885	4,7	4,2	4,9	7,3	17,5	19,6	2,3
6. Crete	943	1.602	668	1,7	4,3	1,8	1,0	13,9	9,0	0,6
7. Epirus	562	1.144	884	2,0	2,6	1,3	1,3	11,6	8,1	0,9
8. THrace	482	2.097	128	4,4	2,2	2,4	1,7	13,8	17,7	1,5
9. Aegean Islands	740	1.500	562	2,0	3,4	1,7	0,8	17,3	13,8	1,0
COUNTRY TOTAL 24 CLOTHING-SHOES	21926	87.284	67.164	4,0	100,0	100,0	100,0	17,0	13,0	1,5
243 CLOTHING	(14.729)	(64506)	(40.986)	(4,4)	67,2	72,9	61,0	11,4	9,6	0,9

Source: ESYE 1978 Industrial Census

Chapter 5

FUTURE GROWTH PROSPECTS OF THE TWO INDUSTRIES

5.1 Typical weaknesses and problems

5.1.1 Short overview.

As mentioned in Chapter 2, the slump in local and international demand for clothing and textile products combined with a worsening of their competitiveness, have been the main factors in creating the crisis in which the two industries find themselves today. Apart from these, there are also a series of other factors[1] which are structural rather than circumstantial and which have a long-term negative effect on the two industries. These emerged in recent years with the rise in Greece's labour costs along with little or no protectionism of local business.

For example, certain branches of the Textile industry which are based on the high quality of locally produced cotton yarns and fabrics have shown impressive growth. But the absence of specialisation and large-scale production activities and a systematic approach to following and/or creating fashion (designs, colours, variety) in ancillary activities such as dyeing and finishing plants, fabric and knitted goods manufacturers weakened this growth. The dyeing and finishing branch suffers from a lack of specialised personnel, quality control procedures and quality standards, with a high dependence on imported

1. See Textile & Clothing Industrial Programme.YPETHO 1984.

colour dyes and lack of skills in production techniques which are all negative factors stunting its development. There are significant weaknesses on the marketing side also; with a lack of orchestrated commercial activities and an established brand/reputation or Greek identity at least on exported products such as clothing , knitwear and fabrics. Other basic weaknesses are the decimation of production in certain sub-sectors such as knitwear and clothing, lack of technology in sub-sectors of both industries as well as grave weaknesses in adapting to and keeping up with ever changing consumer requirements, all of which have resulted in overcapacity and unwanted labour skills.

5.1.2 Troubled enterprises.

The difficulties in which many businesses find themselves particularly textile businesses, may on the surface appear due to circumstantial factors, such as the continuing crisis in the sector but the underlying cause is structural weakness. One of the basic problems in both industries is the burden of debt on business (loan capital vs capital assets). The situation established itself in the 70s, worsening in recent years. This phenomenon occurs not only in the Textile industry but also in Clothing which is made up of small units mainly capitalised through the entrepreneur's own resources. In 1984 the indices were at 86% debt for Textiles and 79% for Clothing (source ICAP). As a consequence, financial expenses as a part of overall product costing grew out of proportion and this cause alone was enough to seriously undermine the performance of

many businesses. This situation arose out of a number of factors; underdevelopment of the financial market and/or reluctance of companies to go onto the stock exchange due to a strong desire to retain ownership, and certain weaknesses in the banking system such as making finance available only against physical collateral rather than the ongoing viability of the enterprise. Even in cases where financing was allowed within the strict bankng guidelines and where businesses were unable to service their debt, mainly through bad management , the banks continued to finance the company in the hope that the situation would correct itself but without imposing any conditions such as organisational or managerial improvements in the business. The main factors which led many businesses in the two industries into trouble were the high burden of debt, inadequate management and structural weaknesses in the industry itself.

Helping troubled enterprises 'turn around', reversing the downward trend in existing production and improving the industry's competitivity has been a main preoccupation of industrial policy in recent years. A big step in this direction was taken with creation and operation of the Reorganisation of Enterprises body (OAE). Under provisions of Law No 1386/83 a whole series of businesses registered as 'troubled enterprises' have become part of the OAE, among them some of the largest textile companies.

Most of the Textile and Clothing businesses undergoing a programme of recovery are in the final, much delayed,

phase and most of them are now judged to be viable. Thus for example, Peraïki-Patraïki the largest textile company increased its capital base by raising share capital to pay off its loan obligations, remaining under the OAE's supervision which took the form of a holding company. The Textile companies of Michaïlides, Douridas, Velka, Ariston, Athina and Pournara have been passed as viable and are back in business on the free market. The Pournara and Athina companies in particular have increased their share capital and capitalisation to honour their outstanding obligations to the banks, the State, National Insurance funds, various supplier companies and to the OAE. The OAE holds the majority of shares in both companies. Moreover, a significant number of businesses which were taken over by the OAE under Law 1386/83 have almost cleared up all their accounts. Amongst these are two from the Textile industry (Perfil and Ilios) and one from the Clothing industry (Volos Clothing Company).

5.2 Guidelines for sector policy on Clothing and Textiles

Within the guidelines of the 5-year economic and social development programme 1983-87 a number of programmes were put together for various sectors of industry which are vital to the Greek economy. The Clothing and Textile industries are among these. Following a series of discussions and working sessions between the State authority responsible, YPETHO, and representatives of the social partners from both industries, the programme is now in the final stages of approval. A sector policy arose out of a need for a coordinated approach to organisational problems and

development combined with a parallel link with the rest of the manufacturing sector. The policy being formulated for the Clothing and Textile sector is in complete harmony with Community policy.

The orientation of the industrial programmme is summarised by an active policy of government intervention for the restructuring and development of the sector. This policy is based on making further use of locally produced raw materials and dynamic development of exports with the main axiom of improving the competitivity of both industries.

Bearing in mind the general objectives of the programme, more specific policy points are:
a) promoting procedures which will (re)orientate companies towards designing and producing new/dynamic products and the use of improved technology to produce high quality goods requiring high technology, particularly for fabrics and clothing.
b) helping prodction units specialise in a small number of products and improve collaboration with other businesses for certain activities (eg. cooperative sales drives and bulk purchasing of raw materials)
c) the creation of a base for Greek fashion, establishment of brands and the improvement of marketing operations, particularly in export-oriented businesses.
d) the creation of suitable circumstances for up-grading production both in terms of quantity and quality (labour, plantand financing).
e) helping to improve internal organisation and business

management skills.
f) the creation of favourable conditions so that troubled enterprises in both industries can take steps towards recovery and modernise themselves.
g) training and retraining opportunities for technical staff as well as middle and senior management skills wherever there is a need.

5.3 Development and reorganisation prospects

Prospects for the Greek Clothing and Textile industries are not particularly bright. The spectacular production and export growth of the 70s appears to be impossible to maintain even under more favourable production conditions and higher export demand. However,both industries have capabilities which, if exploited in a systematic and coordinated way, can contribute to a new growth trend.

In order to have a more specific idea of production in the next few years, certain forecasts have been made regarding domestic product for the periods 1987-90 and 1990-95. These forecasts are more fully presented in Chapter 7 (Table 7.1) and relate to Gross National Product and the elasticity of product in each sector relating to GNP. For Textiles, growth in 1987-90 is forecasted at 2.5% and for 1990-95 at 4.5%. Corresponding growth rates for Clothing are 2.3% and 3.5%.

The peculiarities of Textile subsectors (and of Clothing subsectors to a smaller extent) and the general sensitivity of the two industries to international factors

renders it difficult to forecast prospects at subsector level so these have to remain general. Moreover most textile activities at European Community level are overmanned although employment has fallen substantially in the last 10-15 years in almost all EEC member-states. This, along with recent adverse developments in the industries at national level, underlines the need for sector restructuring and the application of a suitable policy which can be reconciled with assisting troubled enterprises in both industries towards recovery.

On the part of government and business, measures encouraging this should be based on improving production both qualitatively and technologically and specialist labour skills. Otherwise, increased international competition could seriously affect these traditional industries which are not only important to Greek industry as a whole but also to the economy in general.

As previously mentioned, the gradual erosion of the advantage of low hourly labour costs and the huge growth of the Textile and Clothing industries of third world countries are the most disturbing developments affecting a large range of products in both industries,but particularly low technology and low quality ones. It is now recognised that the situation can be faced by concentrating on upgraded fabric and clothing production. It is therefore necessary to apply a selective marketing policy in an effort to acheive higher prices on a platform of product differentiation.

Development in the Textile industry can come from cotton and synthetic fabric weaving through the establishment or expansion of modern plants as well as updating old ones. In the knitwear subsector prospects seem good. In both industries production specialisation and upgrading of product quality are crucial to survival and future growth. The high degree of interdependence of the two industries further underlines the necessity for quality improvements in locally produced fabrics. Basic prerequisites for improvement in textile production are organisational and technological restructuring and upgrading in the dyeing and finishing subsector. There are significant margins for improvement and development of their activities. The textile production cycle can further be improved by modernising cotton ginning mills to upgrade the quality of locally produced cotton. Limited improvements can be made in the silk industry due to recent growth of consumer preference for fabrics made form natural fibres. The importance of developing this subsector is of local rather than national significance. Its growth could contribute to increasing employment in the Evrou region where the the silk industry has traditionally been concentrated.

There are limited prospects in the Clothing industry, despite the growth seen in the last 5 years. It was export-oriented production combined with the industry's links to EEC markets and in particular the development of facon for other EEC member-states which were responsible for a sustained export and production performance of the sector's main products. Based on these observations, growth of both

local and international (European) demand, combined with modernisation of the design cycle of fashion-production-end-product is expected to be mainly for womens' outer-wear, both knitted and otherwise and for knitted under-wear. Of course modernisation implies application of new technology as well as a suitably trained and skilled work-force.

In the area of product design and application of new tech-nology in garment-making it is important to note the work of the Hellenic Product Design Center of the EOMMEH and Greek Clothing organisations. These organisations' act-ivities are oriented towards small and medium-sized bus-inesses. More specifically, the Product Design Centre pro-vides technical and economic assitance to interested com-panies for new product desings and/or redesign of a large range of products. These include fabrics and fabric-based items. The centre also offers a number of scholarships for university grade industrial design specialisations. For the Clothing industry, 'Greek Clothing' was formed in 1985 under the supervision of the Product Design Centre. Its main activities are:

a) Pattern design and cutting of size enlargements using computers and laser (computer-aided design). The technical support system provides training for interested companies on how to cut fabrics in the most economical way.

b) Providing information and fashion forecasts, colour trends, fabric trends, yarns and dye patterns for mens', womens' and childrens' clothing as well as knitwear.

Chapter 6

SKILLED LABOUR AND VOCATIONAL TRAINING

6.1 General observations

Textile and Clothing production continues to be labour-intensive although technological developments have contributed significantly to the growth of specialisation in relation to unskilled labour. However, as previously mentioned, the required skills are closely linked to each subsector which restricts the mobility of this specialised workforce. At the same time the synthesis of the skilled labourforce does not not match the job requirements of modern units. This is mainly due to the small size of the units and weaknesses in management and internal organisation, weaknesses also in their ability to adapt their activities or products suitably and in time to satisfy changing consumer demands both in local and international marekts and the lack of planning for skilled labour requirements combined with weknesses in the existing structure of vocational training and retraining in new skills.

A large proportion of the technical workforce obtained its skills through experience, by apprenticing close to other technicians, neither of whom had any theoretical training. Naturally, this situation restricts the capability of business and even the whole of the industry to adapt to changes in market demands for their products. Apart from the crisis affecting the two industries in varying degees

in recent years, there is a lack of trained staff with the qualifications to make significant contributions to productivity improvements, doubly felt because of the fact that the Greek labour cost advantage has lost considerable ground in relation to other EEC member-states.

6.2 Basic structure for vocational training

Public sector vocational training programmes include a series of technical courses for the Textile and Clothing inductries. Under the current system these courses are offered under intensive training and apprenticeship programmes,which attract the largest number of students, and under formal secondary and tertiary level vocational education (Technical Lykeions and Technological Training Institutes,TEI).

The OAED, the main organisation providing voactional training for the former category has made good progress in the Clothing and Textile sector. Activities include;
a) vocational training under the apprenticeship system for 'ready-made clothing and cutting and sewing skills'. Training includes theoretical learning in schools and practical on-the-job training in a business environment.
b) Intensive training programmes on the following subjects: weaving,sewing,cut-and-sew and knitting machinery. The latter course is being offered for the second consecutive year to a small number of students in an Athens school which operates in collaboration with the Cotton organisation and the Association of Knitters. In 1987 a similar school was opened in Salonica in collaboration with the

Knitters' Association of Northern Greece. Initially, this progamme will only be available for retraining candidates in work. Later on the school will open its doors to the unemployed.

c) retraining workers in cut-and-sew and knitting and sewing machine mechanical skills.

d) financial assistance under the development Law No. 1264/82 for textile and clothing businesses who wish to train their personnel on their own premises and machinery using approved training programmes. In addition to OAED grants, these on-the-job training programmes are also funded by the European Social Fund which approves a large number of these programmes annually.

e) Finally, the OAED has commissioned an investigation into the feasibility of establishing cut-and-sew training departments in a number of Greek cities where it is expected that a significant number of ready-to-wear production units will become established. For the project, the OAED is working in close contact withschools and its regional service departments, relevant employer and employee associations and local authorities. At the same time the possibility of restructuring training programmes to introduce, initially, subjects which relate to fashion designing and pattern-making.

The authorities attempts to upgrade and strengthen vocational training are based on the realisation that training needs in textile and clothing skills have altered in recent years due to automation and increases in product quality.

In addition to the OAED schools at secondary education level there sre two technical lykeions and two technical schools with courses for textiles and cut-and-sew assistants, while at tertiary level (TEI) there is a textile department which provides theoretical and practical training in the following 4 skills; yarn/thread-making, knitting, weaving and dyeing.

Finally, the EOMMEH has contributed actively to the educational sector by providing vocational training to businessmen and staff of small businesses on subjects relating to management and operation of the bsuiness, innovations etc., as well as in special subjects such as; weaving, carpet-making, production technicians (on which there follows a more detailed description).

6.3 Training programmes in special skills for textiles

6.3.1 Technical lykeions for the Textile industry.
The following skills are taught at the Textile department of the Textile Lykeions; yarn/thread-making, knitting and dyeing. The training includes general subjects in addition to the textile orientation, and specialis-d lectures on each of the above 4 subjects. The duration of the course is 3 years, with eligibility to Gymnasium graduates, regardless of sex.

In Tables 6.1 and 6.2 there is a summary of a week's curriculum in the Textile department, by breaking it down into teaching hours of specialised and general subjects in the

second and third year of technical lykeion.[1]

6.3.2 Intensive training courses in Weaving
Weaving skills (hand/traditional loom) are taught through the OAED's system of intensive vocational training. Those over 16 are eligible, regardless of sex but must have at least primary school education. Graduates of the course receive a recognised OAED certificate.

The training programme lasts 3 weeks, 5 days a week. The weekly curriculum has 15 teaching units and 5 categories of subjects[2]. Two thirds of the overall time (720hours) is devoted to practical training ad the remainder (360 hours) to retraining students in 4 categories of theoretical subjects: Technology (180hours), Design (108 hours), Mathematics and data processing/statistics(36 hours) and Hygiene/manners (36 hours). A summary of the programme, broken down into teaching unit, subject category and teaching hours is shown in Table 6.3.

6.3.3. Technical Schools-Textile Assistants.
Like the Technical Lykeions, these schools are supervised by the Ministry of Education and Religion (YPETHO). They

1.See YPETHO'S, 'Terminology and Details of Technical and Vocational School courses, 1984 and Presidential Directive 217/7.1.88 (Government paper 79, Volume A).
2. See Detailed Programme for Weaving Technician skills (OAED), Programme Administration and Teaching Methods, December 1983.

accept Gymnasium graduates and the course lasts for 2 years. In the first year the student selects which profession interests him (eg Textile Assistant) and in the second year selects another skill in the same department (eg. Knitting Assistant).

The course includes theoretical and practical training which takes place outside school premises in suitably equipped workshops. Table 6.4 summarises a weekly curriculum for the second year in the 4 specialised Technical School skills for Textile Assistant.

It is to be noted that technical training for Textiles at Technical Lykeion and School level is limited to 2 Technical Lykeions (Naoussa and Piraeus 5th) and one Technical School (Piraeus 5th).The two Piraeus institutions are under the administration and organisational jurisdiction of the KETEK, Piraeus Textile Centre.

6.3.4 Higher vocational training in skills for Textiles
The School of Applied Technology which is affiliated to the Technological Training Institutes (TEI) also includes a Textile department with 4 skills/orientations. These began to operate in 1984 within the framework of Law No. 1404/83 relating to the structure and operation of the TEI.

80 students a year enter the Textile Faculty at the Piraeus TEI , the only one in operation today, after the National Examinations. It is a three year course divided into academic semesters. During the first 3 semesters

theoretical and practical training exercises are carried out, which are common and compulsory for all students. In the fourth semester common subject hours are reduced as students are asked to select one of the following 4 orientations: spinning, weaving,knitting and dyeing-finishing.

In order to complete the degree, 8 months of on-the-job training experience is required, apart from theoretical and workshop training in school. This is carried out in textile businesses and is supervised by the school's Textile Faculty. Students are remunerated by the business during this period, while the OAED subsidises 50% of this.

The course is 192 hours long. The compulsory common subjects are divided into general and textile subjects. Two thirds of the hours are spent in theoretical training and the remaining one third on workshop exercises with certain differentiations between the 4 orientations. The course is summarised[1] in Table 6.5, broken down into academic semester teaching hours, workshops and skills.

1.For further details see Ministerial Directives YPEPF No. 15/6715, Government Paper 745/22.10.84 and No.E5/1353m Government Paper 1623/28.3.85 where details of all programme contents are laid out.

6.4 Training programmes in special skills for Clothing

6.4.1. Aprenticeship training for Cut-and-Sew.
Cut-and-Sew skills are provided through the OAED's Dual or Alternating Training Aprrenticeship System.[1] The programme includes;

a) two years of theoretical and workshop training broken down into 4 semesters of 15 weeks duration each.
b) social and athletic activities, 2 hours a week during the first year.
c) On-the-job training in the second year, 4 days a week, according to legal working hours.

Eligibility is for 15-18 year olds, Gymnasium graduates, regardles of sex. Candidates are selected by the OAED's Vocational Orientation Committee based on a skills test and socio-economic criteria. The number of students accepted is determined according to annual job market forecasts.

The weekly curriculum includes 13 theoretical subjects in the first year and 4 in the second, combined with on-the-job practical training. A summary of the 1984/5 weekly curriculum is presented in Table 6.6.

With this skill (Cut-and-Sew), graduates of the course can choose between the following jobs: cutter, sewing machinist, cut-and-sew machinist, presser and pattern-maker. Graduates

1. Dual training apprenticeship Cut-and-Sew programme details, OAED Programme Administration and Teaching Methods, June 1985.

are awarded a recognised OAED certficate.

6.4.2Intensive training for Cut-and-Sew and Knitting and Sewing Machine Mechanics.

1) Cutting and Sewing skills are also taught through the OAED's[1] intensive vocational training programmes. Those eligible are between 16-46 years old, regardless of sex, and must have completed at least primary school education (Dimotico).

The course lasts a total of 720 hours spread over a period of 120 working days and 6 hours of teaching daily. The curriculum includes theoretical as well as practical training and is broken down into 5 sections:

a) Practical and theoretical exercises in Cut-and-Sew basics (564 hours)
b) Freehand designing (72 hours)
c) Clothing-aesthetics (30 hours)
d) Financial and technical organisation (30 hours)
e) Social skills (24 hours).

2) Training for Knitting and Sewing Machine Mechanics only recently commenced in 1984/5 with the establishment of an OAED training school under the above title in collaboration with the cotton organisation and the Knitters' Association. The school is based inAthens at the Cotton Organisation's headquarters. The course is 9 months long and

1. See Summary of Cut-and-Sew vocational training proggramme OAED, Programme Administration and Teaching Methods, April 1986.

eligibility is for young people 18-25 years with preference given to the unemployed who have completed at least secondary school (Gymnasium).

The teaching programme is divided into 3 sections which combine theoretical and practical training in the school's workshops and on their equipment. The students follow 2 sections coomon to all, a) Applied Mechanics and b) Quality Control of Textile Products.

The students are then divided into streams according to sewing machine and knitting machine skills selected.

In order to fulfill the needs of businesses in Northern Greece, the OAED is planning to establish and operate another school in Salonica in 1987 in collaboration with the Knitters' Association.

6.4.3. Technical-Vocational Schools,Cut-and-Sew Departments.

These schools, together with the Technical-Vocational Lykeions consist of integrated administrative and organisational scholastic units under the jurisdiction of the Minsitry of Education and accept young Gymnasium students. The schools have a cutting-sewing-household management department where the course lasts 2 years and the student chooses during the first year which stream interests him/her so that during the second year he can specialise in the chosen skill.

Apart from theoretical training, practical training is also carried out in suitably equipped workshops off campus. TES graduates can either enter the job market from here and exercise the profession they have been taught, or they can continue their studies at the Technical-Vocational Lykeions where they are accepted into the second year in any of the departments. At the moment only two schools, in Nikaia and on Samos are offering Cut-and-Sew skills.

6.4.4. Further training in Cut-and-Sew for the already employed.

Another public body, the Organisation of Workers (OEK) also provides vocational training in various skills through the Working Youth Centres (KEN). At the Organisation's 46 cnetres, 14 of which are in the Athens area and the remainder spread out naturally in other urban areas, cut-and-Sew training programmes are also taught. The course lasts two years, each year divided into 4 sections. The annual programme is 420 hours long and includes practical and theoretical training, a total of 14 hours a week. The breakdown is as follows;

HOURLY TIMETABLE

	First Year		Second Year	
	Total	Weekly Hours	Total	Weekly Hours
1. Cutting	120	4	120	4
2. Sewing	180	6	180	6
3. Fashion Design	60	2	-	-
4. Clothing-fabric & colours	60	2	60	2
5. Pattern-making & sizing	-	-	60	2
Total	420	14	420	14

6.5 Further training programmes for staff in private enterprise.

Another area of vocational training activity for the OAED is the subsidisation of business to set up training programmes for their employees. The aim is to upgrade the professional qualifications of the workforce so that they can better adjust to the demands of new technological applications. The programmes have to meet with the approval of the OAED and be supervised by it.

A substantial number of programmes have been approved and subsidised in recent years under the development Law No. 1262/82. In addition to OAED subsidies the programmes are funded through the European Social Fund. The OAED passes a large number of such programmes each year form applications by textile and clothing businesses.

Subsidies paid out to businesses by the OAED between 1982 -86 are laid out in Tables 6.7 and 6.8. Tables 6.9 and 6.10 show educational programmes subsidised or approved for subsidy in the period 85-87, broken down into municipalties, cost of programme and Textile or Clothing skills.

6.6 Further training for businessmen and staff in small-to-medium-sized enterprises and handicraft businesses

Immediate on-the-spot- technical assistance to small/ medium enterprises is freely provided by specialised staff of the EOMMEH and is one of its basic activities which constitutes unofficial vocational training. The EOMMEH however, also contributes to vocational training with

special training programmes which do not compete with, but complement the vocational training programmes of the main authorities concerned (Ministry of Education and OAED). These programmes are aimed at businessmen and staff of small to medium enterprises and are mainly in the form of seminars which cover generalised subjects such as administration/management and operation of small businesses, innovation and certain specialised technical subjects such as weaving, carpet-making etc. Training usually takes place at EOMMEH offices or workshops while the lecturers are either EOMMEH staff or other Greek nationals or sometimes foreign expert speakers.

EOMMEH has a particularly strong presence in vocational training for carpet-making. There are already 23 schools and workshops in operation, spread out nationally with female students. Training is completed in 3 years and is highly specialised.

Another area of EOMMEH activity is weaving, mainly for traditional/ethnic clothing in a cooperative movement to develop traditional products.

The ready-to-wear clothing sector however, is of special interest to the EOMMEH, both through the Product Design Centre and in particular the 'Ready-to-Wear' Clothing department set up to develop fashion and clothing design through special training programmes. These include a programme for training in medium-scale production techniques such as production procedure, use of material, quality

control etc. This programme is carried out by the EOMMEH collaboration with the Association of Clothing Manufacturers in Athens and Northern Greece. The latter are to provide the space and the equipment and the EOMMEH teachers and teaching material. The programme is due to begin its first phase in 1987 in Athens and afterwards in Salonica in order to cover the needs of Northern Greece.

TABLE 6.1: EXAMPLE OF WEEKLY TEACHING TIMETABLE, BROKEN DOWN INTO STREAMS (2nd Year Technical Lykeion, Textile Faculty)

SUBJECTS TAUGHT / DEAPRTMENTS	THREAD-MAKING	WEAVING	KNITTING	DYEING
A.GENERAL SUBJECTS				
Religion	1	1	1	1
Modern Greek	4	4	4	4
History	2	2	2	2
Mathematics	5	5	5	5
Physics	3	3	3	3
Chemistry	1	1	1	1
Foreign Language (English)	2	2	2	2
Physical Excercise	1	1	1	1
B.SPECIALISED SUBJECTS				
Mechanical Workshop	3	3	3	3
Thread Technology	2	2	2	2
Yarn making	1	1	1	1
Cotton Thread-making	2			
Wool yarn making	2			
Thread Workshop	5			
Weaving design		2		
Weaving Machinery Tech.		2		
Weaving Workshop		5		
Knitting design			2	
Knitting Machinery technology			2	
Knitting workshop			5	
Dyeing-finishing				2
Dyeing machinery tech.				2
Dyeing workshop				5
TOTAL NO. OF TEACHING HOURS	34	34	34	34

TABLE 6.2: EXAMPLE OF WEEKLY TEACHING TIMETEBLE,BROKEN DOWN INTO STREAMS 3rd year Technical Lykeion,Textile Faculty)

DEPARTMENTS / SUBJECTS TAUGHT	THREAD-MAKING	WEAVING	KNITTING	DYEING
A.GENERAL SUBJECTS				
Modern Greek	4	4	4	4
Foreign Language(Eng)	2	2	2	2
Constitution				
Mathematics	2	2	2	2
Physical Excercise	2	2	2	2
	1	1	1	1
B.SPECIALISED SUBJECTS				
Mechanical Workshop	3	3	3	3
Quality Control for weaving products	2	2	2	2
Cotton thread making	2			
Wool yarn making	2			
Workshop	12			
Weaving design		2		
Weaving Machinery technology		2		
Weaving workshop		12		
Knitting design			2	
Knitting-machinery technology			2	
Knitting workshop			12	
Dyeing-finishing				2
Dyeing machinery technology				2
Dyeing workshop				12
TOTAL OF WEEKLY TEACHING HOURS	34	34	34	34

TABLE 6.3: EXAMPLE OF INTENSIVE TRAINING PROGRAMME IN THE WEAVING STREAM, AND DISTRIBUTION OF HOURS

TEACHING UNITS	THEORETICAL SUBJECTS				PRACTICAL TRAINING
	Technology	Mathematics	Design	Hygiene/ Manners	
A. INTRODUCTORY SUBJECTS					
1. Introduction	6				
2. The Loom	10				
3. Weaving materials	10				10
B. PREPARATION					
4. Weft, warp	14				
5 Weft details	10				50
					60
C. WEAVING					
6. Weaving items	100				
7. Carpet-weaving	10				500
8. Fabric faults	5				50
					5
D. RELATED SUBJECTS					
9. Calculation-Maths		36			
10. Colours and dyes	5				
11. Design			108		15
12. Embroidery/Cutting/ Sewing	10				30
E. GENERAL SUBJECTS					
13 Hygiene-Safety				6	
14. Professional Ethics				19	
15. Social Behaviour				11	
TOTAL TEACHING HOURS	180	36	108	36	720

TABLE 6.4: EXAMPLE OF WEEKLY TEACHING TIMETABLE IN SECOND YEAR OF OF TECHNICAL SCHOOL FOR TEXTILE TECHNICIANS

SUBJECTS TAUGHT / SPECIALISATION	ASSISTANTS			
	THREAD	WEAV-ING	KNIT-TING	DYE-ING
A. GENERAL SUBJECTS				
Modern Greek	2	2	2	2
Mathematics	1	1	1	1
Physics	1	1	1	1
Foreign Language (English)	1	1	1	1
The Democratic Constitution	1	1	1	1
B. SPECIALISED SUBJECTS				
Machinery Workshop	6	6	6	6
Cotton thread-making	3			
Woolyarn-making	3			
Yarn Workshop	12			
Weaving DEsign		2		
Weaving Machinery Technology		4		
Weaving Workshop		12		
Knitting Design			2	
Knitting Machinery Technology			4	
Knitting Workshop			12	
Dyeing-Finishing				4
Dyeing Machinery Technology				2
Dyeing Workshop				12
TOTAL TEACHING HOURS	30	30	30	30

TABLE 6.5: EXAMPLE OF CURRICULUM IN THE TEI TEXTILE FACULTY, SEMESTERS, DISTRIBUTION OF TEACHING AND WORKSHOP HOURS

COMPULSORY (COMMON) SUBJECTS	1st Sem		2nd Sem		3rd Sem	
	D	E	D	E	D	E
1. Mathematics I	5	-				
2. Physics I	3	2				
3. General Chemistry	2	2				
4. Mechanics I	4	-				
5. Mechanical Design	1	4				
6. General Weaving I	4	2				
7. Foreign Language I	3	-				
8. Mathematics II			5	-		
9. Physics II			3	2		
10. Physicochemistry			2	2		
11. Mechanics II			3	2		
12. Chemistry-Polymer Technology			2	2		
13. General WEaving II			4	2		
14. Foreign Language II			3	-		
15. Applied Mathematics					5	-
16. Machinery					3	-
17. Physics of Weaving					3	-
18. Weaving Technology					3	2
19. Weaving Technology					2	2
20. Knitting Technology					2	2
21. Dyeing-Finishing Technology					3	2
22. Foreign Language III					3	-
TOTAL SEMESTER HOURS	22	10	22	10	24	8

TABLE 6.5 CONTD

	4th Sem		5th Sem.		6th Sem	
	D	E	D	E	D	E
23. Computer Programming I	2	2				
24. Dyeing-Finishing Quality Control	1	3				
25. Fibre-yarn Quality Control	2	2				
26. Foreign Language IV	3	-				
27. Computer Programming II			2	2		
28. Automated Control System			3	2		
29. Machinery PLant			3	-		
30. WEaving-KNitting Quality Control			2	2		
31. Digital-Micro-computers					3	3
32. Marketing					3	-
33. Organisation, Business Management					3	-
34. Legal Framework					3	-
35. Work Safety					3	-
36. Non Woven					2	1
TOTAL SEMESTER HOURS COMMON SUBJECTS	8	7	10	6	17	4
TOTAL No.OF HOURS BY SUBJECT						
Thread	19	13	22	10	21	11
Weaving	15	17	17	15	20	12
KNitting	17	15	19	13	24	8
Dyeing-Finishing	16	16	18	14	23	9

TABLE 6.5 CONTD

SPECIALISED SUBJECTS	4th Sem D	4th Sem E	5th Sem D	5th Sem E	6th Sem D	6th Sem E
YARN-MAKING						
1. Fibres	4	2				
2. Yarns I	5	-				
3. Technical Yarn Production I	2	4				
4. Yarns II			5	-		
5. Tecchnical Yarn Production II			2	4		
6. Machinery Structure-Yarns			5	-		
7. Technical Yarns					2	3
8. Quality Control-Fibres, Yarns					2	4
TOTAL YARN-MAKING	11	6	12	4	4	7
WEAVING						
1. Weaving I	3	2				
2. Technical WEaving Production I	2	4				
3. Weaving Design I	2	4				
4. WEaving II			3	2		
5. Technical Weaving Production II			2	4		
6. Weaving Design II			2	3		
7. WEaving III					2	2
8. Technical Weaving Production III					1	3
9. WEaving Design III					-	3
TOTAL WEAVING	7	10	7	9	3	8

TABLE 6.5 CONTD

SPECIALISED SUBJECTS CONTD	4th Sem D	4th Sem E	5th Sem D	5th Sem E	6th Sem D	6th Sem E
KNITTING						
1. Knitting I	5	-				
2. Technology of Knitting I	2	4				
3. Knitting Design I	2	4				
4. KNitting II			5	-		
5. Technology of Knitting II			2	4		
6. Knitting Design II			2	3		
7. Knitting III					5	-
8. Technology of Knitting III					2	4
TOTAL KNITTING	9	8	9	7	7	4
DYEING-FINISHING						
1. Chemistry of Colours	3	3				
2. Bleaching Technology	3	3				
3. Transfer heating	2	3				
4. Dyeing			3	-		
5. Technology of dyeing			-	4		
6. Machninery Plant I			2	-		
7. Printing Technology			3	4		
8. Dyeing Machinery II					2	2
9. Finishing					2	3
10. Dyeing wastes					2	-
TOTAL DYEING-FINISHING	8	9	8	8	6	5

TABLE 6.6: EXAMPLE OF APPRENITCESHIP PROGRAMME FOR CUT-AND-SEW SKILLS

SUBJECTS TAUGHT	TEACHING HOURS BY SEMESTER			
	1st Sem	2nd Sem	3rd Sem	4th Sem
1. Greek	2	2	-	-
2. Social Behaviour	1	-	-	-
3. Economics and Work Organisation	1	1	1	1
4. Applied Mathematics	2	2		
5. Applied Physics	1	1		
6. Applied Chemistry	-	1		
7. Technology of Weaving Materials	1	1		
8. French Technical Terminology	2	2	2	2
9. Work Safety	1	-		
10. Clothing	1	1		
11. Freehand Design	3	3		
12. Cutting	8	8	3	3
13. SEwing	10	10	5	5
WEEKLY TOTAL OF HOURS	33	32	11	11
COMMUNITY-EXERCISE	2	2	-	-
TOTAL WEEKLY HOURS	35	34	11	11

TASLE 6.7: GRANTS GIVEN TO TEXTILE BUSINESSES FOR PERSONNEL TRAINING PROGRAMMES (1982-6)

12 BUSINESSES

Code	1982			1983			1984		
		Grant mn drs			Grant mn drs			Grant mn drs	
	People	OAED	ESF.)	People	OAED	ESF)	People	OAED	ESF
X1	167	9.7	10,7	-	-	-	-	-	-
X2	186	21,5	23,6	606	50,4	56,0	727	21,1	23,2
X3	-	-	-	160	6,8	7,5	-	-	-
X4	-	-	-	157	10,9	12,0	-	-	-
X5	-	-	-	-	-	-	125	1,0	1,1
X6									
X7									
X8									
X9									
X10									
X11									
X12									
X	353	31,2	343	923	68,1	75,5	852	22,1	24,3

TABLE 6.7 CONTD

Code	1985			1986*			1982-86		
	people	GRant mn drs			Grant mn drs			Grant mn drs	
		OAED	ESF	People	OAED	ESF	People	OAED	ESF
X1	-	-	-	-	-	-	167	9,7	10,7
X2	58	3,9	4,3	-	-	-	1.577	96,9	107,1
X3	-	-	-	-	-	-	160	6,8	7,5
X4	67	2,3	2,5	72	5,2	6,4	296	18,4	20,9
X5	-	-	-	-	-	-	125	1,0	1,1
X6	113	20,6	22,7	91	14,0	17,1	204	34,6	39,8
X7	79	8,3	9,2	45	3,1	3,8	124	11,4	13,0
X8	-	-	-	177	6,0	7,3	177	6,0	7,3
X9	-	-	-	36	4,4	5,4	36	4,4	5,4
X10	-	-	-	38	4,5	5,5	38	4,5	5,5
X11	-	-	-	193	23,6	28,8	193	23,6	28,8
X12	-	-	-	29	3,4	4,1	29	3,4	4,1
X	317	35,1	38,7	681	64,2	78,4	3.126	220,7	251,2

* 1986 estimate

TABLE 6.8: GRANTS GIVEN TO CLOTHING BUSINESSES FOR PERSONNEL TRAINING PROGRAMMES 1982-6

Code	1982			1983			1984		
		mn drs			mn drs			mn drs	
	People	OAED	ESF	People	OAED	ESF	People	OAED	ESF
Y1	80	6,2	6,8	120	7,8	8,6	-	-	-
Y2	-	-	-	192	14,0	15,4	-	-	-
Y3	-	-	-	96	6,5	7,1	-	-	-
Y4	-	-	-	88	5,8	6,4	-	-	-
Y5	-	-	-	-	-	-	70	4,7	5,2
Y6	-	-	-	-	-	-	78	6,4	6,9
Y7	-	-	-	-	-	-	40	2,5	2,7
Y8									
Y9									
Y10									
Y11									
Y12									
Y13									
Y14									
Y15									
Y16									
Y17									
Y	80	6,2	6,8	496	34,1	37,5	188	13,6	14,8

TABLE 6.8 Contd

Code Businesses	1985			1986			1982-86		
		Allowance (mn drs)			Allowance (mn drs)			Allowance (mn drs)	
	Peo	OAED	ESF	Peo	OAED	ESF	People	OAED	ESF
Y1							200	14,0	15,4
Y2							192	14,0	15,4
Y3							96	6,5	7,1
Y4							88	5,8	6,4
Y5							70	4,7	5,2
Y6							78	6,4	6,9
Y7				34	3,2	4,0	74	5,7	6,7
Y8	40	2,9	3,2	-	-	-	40	2,9	3,2
Y9	18	0,8	0,9	-	-	-	18	0,8	0,9
Y10				27	2,6	3,2	27	2,6	3,2
Y11				44	4,0	4,9	44	4,0	4,9
Y12				24	2,1	2,6	24	2,1	2,6
Y13				38	4,4	5,4	38	4,4	5,4
Y14				29	2,7	3,3	29	2,7	3,3
Y15				29	2,7	3,3	29	2,7	3,3
Y16				29	2,7	3,3	29	2,7	3,3
Y17				29	2,7	3,3	29	2,7	3,3
Y	58	3,7	4,1	283	27,1	33,3	1105	84,7	96,5

The figures for the year 1986 are estimates

TABLE 6.9: 1985 TRAINING ALLOWANCES FROM THE ESF AND THE AOED FOR STAFF TRAINING PROGRAMMES IN TEXTILE BUSINESSES

Area	No.of Businesses	No of People[1] A	No of People[1] B	Cost mn drs	Specialties
Salonica	1	-	79	17,5	Threader, bolt bars, Bobbin-makers Supervising staff
Achaia	1	-	58	14,3	Dyeing unit, Printing unit Finishing unit, Production Organisation
Kilkis	2	103	66	17,2	Threaders, Openers, Carders, Combers
TOTAL	4	103	203	89,0	

1. Includes persons taking part under 25 years old (Col a) and over 25 years old (Col B)

TABLE 6.9 CONTD 1986

Area	No. of Businesses	No.of People A	No.of People B	Cost mn drs	Specilaites
Magnesia	1	38		15,1	Open machinery,Threaers Bobbin-makers,Maintenance Accounting,Packaging
Trikala	2	29	36	26,0	Dyeing,Cleaning,Threaders Twisters,openers,bobbin-makers, Maintenance, Warehouse, Control, Management
Salonica	2	-	238	89,1	Threader, Twisters, Bobbin-makers,Maintenance Control, Supervisory Staff,WArehouse
Kilkis	2	20	119	46,5	Technical Staff,Carders Twisters
Pellis	1	-	177	20,0	Production Personnel Maintenance,Management Training,information Technology
TOTAL	8	87	570	196,6	

TABLE 6.9 CONTD: for the Year 1987

ARea	No. of Businesses	No.of People A	No.of People B	Cost mn drs	Specialties
Argolida	2		51	22,5	Draggers,Threaders, Bobbin-makers
Attiki (Athens area_	1		122	61,4	Bobbin-makers,dyers, Cutters,Pressers,
Magnesia	2		197	87,0	Warehouse Threaders,Bobbin-makers, Accounting,Twisters,
Messinia	1	53	150	106,7	Winders,Packaging Cotton yarn-making, Wool yarn makig,Dyeing Twisting,Maintenance
TOTAL	6	53	520	277,6	

Table 6.10: 1985 TRAINING ALLOWANCES FORM THE ESF AND THE OAED FOR STAFF TRAINING PROGRAMMES IN CLOTHING BUSINESSES

Area	No.Of Businesses	No.of People[1] A	B	Cost mn drs	Specialties
Achaîa	2	12,	41	7,9	Sewing
Salonica	2	8	65	15,9	Seaming,Cutting-sewing
Total	4	20	106	23,8	

[1]The figures include the participants of further training programmes: those under 25 (column A) and those over 25 (column B)

TABLE 6.10 CONTD 1986

Area	No. of Businesses	No. of People A	No. of People B	Cost mn drs	Specialties
Achaîa	2	71		22,2	Sewing
Attiki	1	25		11,9	Seaming,Pressing, Cutting-Sewin
Larissa	2	9	13	14,8	Knitting,Sewing,
Salonica	2	9	13	9,4	Sewing, Knitting, Sales
Evrou	3		87	27,0	Seaming,Cutting SEwing, Pressing
TOTAL	10	129	114	85,3	

TABLE 6.10: CONTD 1987

ARea	No of Businesses	No of People A	No of People B	Cost mn drs	
Attikis					
Atthens area	1		46	16,1	Seaming,Cuting SEwing
Argolida	1		60	19,9	Seaming
Achaîa	6	130	114	88,3	SEaming,Cutting Sewing
E.Attika	1		25	12,0	Seaming,Cutting, Pressing,Knitting
Evrou	4	48	211	98,3	Seaming,Cutting. Pressing,Cutting, SEwing
Salonica	14	317	413	242,1	SEaming,Cutting, Pressing,Packaging, Control,Warehouse KNitting
Kilkis	2	29	22	24,5	SEaming,Cutting Sewing
Xanthis	1	109	50	27,5	Knitting,Cutting Pressing,Packaging
Magnesia	2	18	171	47,5	Cutting-Sewing Pressing,Control Warehouse
Piraeus	3	72	173	72,7	SEaming,Cutting- SEwing,Accounting
Pellis	6	713	471	419,7	Design,Management Sales,INformation Technology,Cutting

TABLE 6.10 CONTD

Area	No.of Businesses	No.of People A	No.of People B	Cost	
					sewing seaming,Pressing, Warehouse,Accounting
Rodopis	5	212	113	281,6	Cutting-Sewing Regulating,Quality Control,Pressing, Packaging
Larissa	3	42	25	29,4	Cutting-Sewing Quality Control DEsign,Packaging
TRikala	1	10	10	8,5	Cutting-Sewing Pressing,Quality Control
TOTAL	50	1700	1904	1.388,1	

Chapter 7

1987-1995 EMPLOYMENT PROSPECTS IN THE CLOTHING AND TEXTILE INDUSTRIES

7.1 Methodology

The methodology used in this survey is based on mixed forecasts[1] of overall employment in basic subsectors of the industry.

The estimates laid out in Tables 7.1-7.4 are based on the quantitative elasticity ration of employment to product in each sector, on average rate of product growth forecasts for each sector as well as influx of skills into the sub-sectors examined.

The sources used were ESYE (Central Statistical Office) publications and National Budget figures for product, employment and their breakdown into major professions over the last 15 year period. Additonal information sources used were staff and employees in business.

The estimates for overall employment in each sector were based on the following mathematical model:

$$A_{it}=A_{io}\left|(1-e_i)+e_i(1+g_i)^v\right|$$

where A_{it} is the estimate of employment in sector i in the

1. This methodology has been used in previous surveys in order to estimate future labourforce requirements in sectors of Greek industry.

year t (1987,1990,1995), A_{io} is the level of employment in sector i in the base year (1986), e_i the elasticity ratio of work/product in sector i, g_i the predicted average annual rate of product growth in sector i and v is the year for which the employment estimate is made.

7.2 Estimates by sector, region and basic profession.
Overall employment estimates in each sector for 1987, 1990 and 1995 were calculated both at national and regional level.

The estimated annual rates of product growth for each sector (g_i) presented in Table 7.1 were based on estimates of the corresponding sector's elasticity and product growth inrelation to GNP. These elasticities are averages of 5-year current prices in the period 1974-84 and were used for the following period 1986-95. The long-term stagnation which affects the Greek economy as a whole, combined with its weaknesses and structural problems, do not indicate prospects for significant increases in the economy's growth rate in the next 5 years. The GNP growth forecasts used and presented in Table 7.1 for the periods 1987-90 and 1990-95 are based on a realistic senario which does not differ very much from the corresponding EEC figures.

The elasticity of work/product ratio (e_i) for each sector were calculated from statistical data[1] in the industrial

1. The data came from the 1969 and 1979 censuses (83 figures not yet published). In any case there do not seem to be any major shifts significantly affecting the estimates.

census. These elasticities which have been used in a previous survey[1], are laid out together with overall national employment forecasts for both industries in Table 7.2.

These estimates show that overall employment in Textiles as well as Clothing will grow at almost double the rates in 1990-95 (1.7% for Textiles and 1.9% for Clothing), than those of the immediately preceeding period of 1985-90 (0.8% and 1% respectively).

In absolute numbers, employment in both industries is expected to grow by 10000 people during 1987-95. Prior to this, the small growth marked in 1986 in relation to 1985 is expected to be followed by a corresponding fall in 1987 back to 1985 levels again.

Regional breakdowns of the employment forecasts for 1987-1995 were also estimated. Constant prices for the years 1969,1973,1978 and 1981 were averaged according to available regional figures. The resulting regional indices for the years 1987,1990 and 1995 for both industries are presented in Table 7.3. It is assumed that regional indices will not alter significantly in the period examined. In both industries there is evidence of a concentration in the East Mainland and Islands although Clothing has a higher degree of decentralisation than Textiles.

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1. See'Summary of Investigation into Requirements and Development of Industrial Education in Greece', A&P Vorloou, I.Drimousis,P. Nikolaou, Athens 1981.

Finally, an attempt has been made to estimate employment levels in basic sectors of the two industries. Unfortunately the available figures do not permit calculation to 3-figure level, only 2-figure level of professionalcategories, which means that only one profession per sector can be examined. (Professional categories No. 75 and 79).

However, for the Textile industry a certain number of guesstimates were made on employment levels for 5 basic professions using an indirect method. Specifically, 3-figure categories were used for the period 1970-81 (ISIC codes), combined with major professional categories from the 1971 population and business census. Table 7.4 illustrates employment forecasts by profession assuming employment in the basic categories during 1971-81 was linked to the overall 3-figure category for the same period (eg. that jobs for knitters grew at the same rate as employment in the knitwear sector overall). This is how employment in the basic textile skills developed in 1981 and it is assumed that this will not signficantly change in the period examined. An adjustment has been made however to take into account the share of the basic skills (code 75) in relation to overall employment in the sector: 73.4% in 1971, 70% in 1981, and, following the trends established in this decade, 67% in 1995.

According to the above forecasts, the demand for basic skills in the 2-figure 75 category will grow by only 2820 people during 1981-85. This growth represents around one third of the total growth for the sector, which is estim-

ated at 7650 people for the period inquestion.

Finally, it is to be noted that the above employment estimates are intended as indications in order to identify basic trends in the future needs of the two industries, rather than to pinpoint the exact number of future demand for each skill. The prediction of future requirements both in terms of volume and of new skills for both industries is without question very useful in creating a groundwork for vocational education/training in Greece. It is clear however,that, apart from the need for additional information and detailed analysis of each skill, there is also a need for further analysis which is outside the scope of this document. We believe however, that we have exposed the main weaknesses and these weaknesses are quite good reflections of where future labourforce requirements in both industries lie.

TABLE 7.1 MANUFACTURING GROWTH FORECASTS:TOTAL MANUFACTURING PROCESS CLOTHING AND TEXTILES

	Elasticity vs GNP	1986	1987	1988-90	1987-90	1990-95
GNP		0,5	-0,5	3,0	2,3	3,5
Manufacturing	1,20	0,6	-0,6	3,6	2,5	4,2
Textiles	1,20	0,6	-0,6	3,6	2,5	4,2
Clothing	1,00	0,5	-0,5	3,0	2,3	3,5

TABLE 7.2:EMPLOYMENT FORECASTS IN THE CLOTHING AND TEXTILE INDUSTRIES

	TEXTILES	CLOTHING
	Elasticity of Working Product 0,381	0,528
1985	74 468	68 946
1987	74 468	68 946
1990	77 645	72 320
1995	84 400	79 490
	Rate of Change	
1985-90	0,8%	1,0%
1990-95	1,7%	1,9%

TABLE 7.3: REGIONAL EMPLOYMENT FORECASTS 1987-95, CLOTHING AND TEXTILES

REGION	TEXTILES				CLOTHING			
	%	1987	1990	1995	%	1987	1990	1995
1. E.Mainland & Islands	58,17	43 321	45 170	49 099	50,75	34 990	36 702	40 340
2. Central&W.Macedonia	20,14	14 995	15 634	16 995	24,23	16 705	17 525	19 260
3. Peloponnese &W.Mainland	8,30	6 180	6 443	7 004	6,72	4 634	4 860	5 342
4. Thessaly	7,06	5 257	5 481	5 958	5,51	3 800	3 985	4 380
5. East Macedonia	1,03	768	801	870	4,72	3 256	3 416	3 755
6. Crete	1,81	1 349	1 406	1 529	2,37	1 636	1 716	1 887
7. Epirus	2,08	1 549	1 615	1 755	1,69	1 164	1 220	1 342
8. Thrace	0,72	533	556	605	2,06	1 422	1 492	1 640
9. E.Aegean Islands	0,69	516	539	585	1,94	1 339	1 404	1 544
COUNTRY TOTAL	100,0	74 468	77 645	84 400	100,0	68 946	72 320	79 490

The regional employment figures have been calculated on the basis of equivalent figures for the years 1969, 1973, 1978 and 1981, as presented in the study "Employment in the basic sectors of the Greek economy in 1981", A. Borlou, L. Lambropoulou, G. Vaphiadi, KEPE, Athens 1985

TABLE 7.4: EMPLOYMENT FORECASTS FOR BASIC TEXTILE SKILLS
1987-95

BASIC TEXTILE PROFESSIONS	CENSUS 1971	FORECASTS 1987	1990	1995
75 YARNS,THREADERS:KNITTERS DYERS ETC	46 064	51 080	52 720	56 600
7.52 Yarnpmakers,Thread-makers, natural fibres	4 764	5 350	5 530	5 900
7.54 Weavers	19 860	21 440	22 130	23 600
7.55 Knitters	14 932	19 100	19 700	21 100
7.56 Bleachers,Dyers, Finishers	2 008	2 090	2 160	2 500
7.51 Pre-preoared natural fibres	3 444	3 100	3 200	3 500
7.53 WEaving Machine Techns	836			
7.59 Other Yarn-makers & WEavers	220			
TOTAL SECTOR EMPLOYMENT	62 736	74 468	77 645	84 400
75 CATEGORY EMPLOYMENT	73,4%	68,6%	68%	67%

Chapter 8

CONCLUSIONS-PROPOSALS

8.1 General Observations

Despite the continuing economic recession and the relatively high unemployment level, there is evidence on the job market of a strong demand for skilled personnel which cannot be satisfied due to the lack of suitably qualified technical workers. At the other extreme, there is a large number of young Gymnasium and Lykeion graduates with a general educational background rather than a vocational training background. This situation is typical for all sectors of the Clothing and Textile industry wherever there is evidence of large gaps in trained personnel for various skills. These gaps occur both in the technical and managerial departments. If they could be dealt with successfully, productivity and competitivity could be improved as well as modernisation of businesses in both industries.

Most of the employees in the two industries are unskilled workers or self-taught technicians and therefore they naturally cannot cope with changing technological requirements. This is a trait of most sectors of Greek industry but is more acute in Clothing and Textiles. At the same time the educational system as a whole, although much improved in recent years, continues to provide technical and vocational education only on a limited scale (20% only of students in technical and 80% in general education). On

the other hand, there are significant gaps in certain vital industrial skills. For example, the Greek Textile industry employs around 300 people skilled in textile technology, all of whom have been trained abroead, mainly in England and West Germany. Gaps in skills for new technology are even more acute.

The need to adapt to new technology even in more traditional sectors as are the Clothing and Textile industries, puts additional pressure on updating technical and vocational training.This need is even more evident in the recently intensified competition in internal and international (mainly EEC) markets. Consequently, businesses are pressure to coordinate their efforts to improve their productivity by applying new production procedures such as automation, use of computer technology etc., combined with reorientation of production towards higher quality products with stiffer technological requirements.

8.2 Technical and material framework

Ther are in addition, significant gaps in the provision of training centres, despite the work carried out in recent years to upgrade and expand the technical-vocational training provided. The lack of suitably trained teaching personnel in enough numbers is also felt, but in addition the equipment installed in many of the centres is out-of-date or even non-existent, so that they are unable to satisfactorily relate to the contemporary requirements of training/retraining. In many cases the mechanical installations are seriously out-of-date relative to those used in

business with the result that graduates run into problems of adjusting to the machines and technology used in the real marketplace. This situation recurs to a smaller or larger extent at all training levels.

More specifically,in Textiles there is a basic structural framework in place for all technical training levels. But at secondary and tertiary level this structure is limited and only to be found in the Athens area. Moreover, equipment for tertiary training levels (TEI) has been put in place only very recently. The only Technical TEI in operation is based in Piraeus and was opened in 1984-5. Secondary vocational training levels (Apprenticeship system) and the informal Intensive training levels provided by the OAED are more accessible being more spread out geographically. In Clothing, training is not sufficient at secondary levels and does not go as high as tertiary level. It is limited to training programmes provided mainly by the OAED (apprenticeship and intensive training courses) within the framework of a technical and material structure at a highly regionalised level.

Efforts by the OAED and the Ministry of Education in recent years to improve vocational training include: updating and expanding training installations, gradual renewal and build-up of training equipment, updating old and creating new training programmes, improving and filling in gaps in technical texts and more generally in educational documents, retraining of teaching staff and the development of more productive relations with private or public enter-

prises in certain specialised sectors.

8.3 Further training of staff and technicians

Further training of staff in new technology has now become necessary for many businesses. This arises out of the fact that, during the intensive growth period, new production units and expanding older ones were staffed by people without knowledge and experience of the new technologies, which could prevent the further development of the two industries. Thus the skills gap which exist today is more intense at middle management level, mainly foremen and technical staff. This gap has naturally given rise to a number of problems in the production cycle, in design and quality of the products and has contributed to higher production costs.

Moreover the disadvantage of the relatively high cost of textiles in European countries is likely to influence the wider spread of microelectronics into the Clothing and Textile industries with a subsequent real improvement in productivity and competitivity. This trend would lead to recouping the initiative from countries with low production costs to countries specialising in the mass production of high technology products. Given that North European countries have relatively higher labour than Southern European ones, it would follow that the new technological developments would be to the advantage of the former. Nevertheless, if technological developments are not taken seriously by the community and by businesses and labour, the next few years could see a worsening of the unemploy-

ment problem along with a drop in competitivity in both industries. It is probable that employment in more traditional sectors will fall at a faster rate than it can increase in sectors requiring skills in new technology. However suitable training of staff in good time and gradual adaptation to new developments can go a long way in alleviating these adverse consequences.

Apart from retraining staff in which the two industries are already involved, it is necessary also to introduce selected new technology training courses in to the curriculae of Technical Lykeions and the TEI as well as in intensive training and apprenticeship programmes. These new courses should be suitably adapted to the educational/ training level concerned.

Another area of training in new technology concerns skilled worker-technicians who have been laid off or who will be laid off as a result of industry restructuring. Their retraining in new technological skills would help to facilitate their mobility to other sectors. Action in this area must be closely supervised in order to ensure the provision of properly skilled teaching staff so that the qualitative as well as the quantitative side of the education/training provided will be ensured.

It is also crucial to continue the work that the OAED has begun in encouraging Textile and Clothing businesses to contribute to the financing of training/retraining their personnel in the new technology.

8.4 Organisations which can contribute to the improvement of education /training

The OAED will continue to take the initiative in technical and vocational training. Its long experience in this area its regional spread of services and training centres and its close contact with the job market allow it great flexibility to respond to the changing needs of a skilled labourforce. Thus its role in technical/voactional training is expected to grow rather than diminish. Moreover, OAED activities in the educational sector are complimentary rather than antagonistic to the other public bodies (YPETHO, ELKEPA, EOMMEH).

Within this framework, the OAED's basic objective in education is to systematically investigate and monitor the skills required in each sector of the labourforce as well as adapting the training programmes to the job market's demands.

The OAED could also play a significant role in developing training for new technological skills for the Clothing and Textile industries. It is currently re-examining the orientation of the training it provides within the framework of an investigation into the job market's requirements, in order to be able to offer skills in sectors relating to the growth of new technologies.

The main educational authority, the Ministry of Education, will be playing an imprtant role in improving vocational training, particularly in expanding tertiary level pro-

grammes to include new technologies relating to the two industries. The ELKEPA could also contribute to upgrading vocational training in a certain number of skills. These include marketing, organisation of production and other related subjects.

The EOMMEH is a large contributor in the area of vocational training for staff in small businesses. Its activities in the educational sector would fill in gaps relating to he particular needs of small buseness which cannot be included in the YPETHO's or OAED's training programmes.

8.5. Vocational training improvements in skills for the Clothingindustry

As mentioned earlier, vocational training in skills for the Clothing industry is basically limited to the apprenticeship and intensive training programmes provided by the OAED and which cover a limited number of skills. Upgrading the quality of these programmes combined with a certain amount of restructuring and expanding to include new skills will be a determining factor in helping the industry to become more competitive. At the same time, preconditions are being created which will facilitate adaptation to changing conditions on the international scene, particularly in the area of utilisation of new technology in a traditional industry such as the Clothing industry.

This view is also held by represenatives of clothing manufacturers who support the need for the community to improve the level of voactional training for clothing and its

expansion to include skills which are hitherto not covered or scarcely covered by the current educational system. These skills acn be divided into 3 basic orientations at one or more educational levels, which cover the whole of the cycle from design to product distribution.

More specifically, the first orientation relates to product design and development wherever input is required from higher and middle level staff (foremen) in for instance the following categories: stylists, pattern-makers, dressmakers, marketing and export managers specialising in ready-to-wear. The second orientation relates to the technology of manufacturing clothing which influences all the technical and manual labour in the production cycle (cutting-sewing-pressing-packaging) and includes subjects such as management of production equipment and materials. The third orientation relates to the marketing aspect of the clothing business where there is a need for input from higher and middle level staff with the following ready-to-wear skills: dressmakers, designers, marketing managers and production technicians.

A soon-to-be-established fashion institute, a public sector initiative by the Ministry of Education, will cover design and technical skills.This will be an important step forward in creating the preconditions for industry growth through the creation of training programmes in vital skills such as those mentioned above and which cannot today be obtained in Greece. Creating a foundation for training in skills such as fashion design is a key element in the future

growth of the industry. It is however important to improve the quality of training programmes for all the above-mentioned skills. The degree of success will depend on the cooperation of all the social partners (community, workers and employers) in establishing realistic and effective solutions for the restructure and development of the industry.

8.6 Vocational training improvements in skills for the Textile industry

Vocational training in Greece for Textiles currently covers all educational levels for a wide range of skills as described in Chapter 6. But as for the Clothing sector the Textile industry suffers from a lack of skilled personnel despite the employment recession

Apart from the structural weaknesses and gaps in the trained workforce mentioned earlier, educational programmes for the industry also require upgrading and new programmes introduced for new skills which are needed in order to improve competitivity. Moreover retraining is required for the unemployed or those who are expected to become unemployed, so that they can be given the opportunity either of reemployment in the Textile industry or redeployment in other sectors.

The necessity for vocational training in new skills at all educational levels should be emphasised although there are currently no detailed estimations of the industry's requirements. Therefore it follows that an investigation should

be commissioned into the skills required for a trained labourforce particularly in new technologies so that an educational policy can be laid down at both national and regional level. There are already however concrete indications of the skills in demand. These informations come from industry representatives and educational bodies who monitor the job market, such as the OAED and the YPETHO.

More specifically, spokesmen for the Textile industry report that gaps in skilled personnel are to be found mainly in upper technical echelons for skills which are not currently taught in training schools eg. sock machine and sewing machine mechanics, sock dyers, machinery technicians for changing and installing new designs and production managers. There are also gaps in skilled personnel who could be trained by the intensive method such as knitters, sewing machinists and overlocking machinists.

At the higher and middle level of staff there are opportunities for foremen, production work supervisors, inventory clerks, electronics operators and computer programmers, maintenance technicians for the latest machinery, quality control specialists, textile product designers and marketing specialists. These skills should be taught at secondary and tertiary level education. It should be noted that the legal framework for tertiary level education provides for the operation of specialised 6-month seminars, the only prerequisite being a sufficient demand for these new skills. These seminars could also prove useful for those already in the industry who need to brush up on or learn new skills

in order to cope with particular problems related to the area in which they are working.

The establishment of a centre for Textile and Fabrics Technological Development operated in collaboration with the Ministry of Industry, Research and Technology, the EOMMEH and the OAED, will assist towards the restructuring of the industry by guiding it towards new technology products. It is funded by the MOP Attika programme and implements vocational training programmes aimed at modernising the manufacturing process and improving productivity. The Ministry of Education, EOMMEH and ELKEPA are all involved in the programmes.

The CEDEFOP could also be of great assistance in upgrading and restructuring vocational training in the above areas in Clothing and Textile industries:
a) with financial and practical assistance in remodeling training programmes and fixing training levels for each skill so that they can relate to business needs in both industries.
b) sending trained Greek teaching personnel to other EEC countries in order to acquire new knowledge and experiences in education particularly in new skills and providing them with economic and technical assistance.
c) sending experts and trainers from CEDEFOP to Greece in order to assist with the development of training programmes.

In order to encourage fruther decentralisation of activities and the geographical mobility of workers in both ind-

ustries, the possibility of part funding by the ESF and ETPA and MOP programmes should be investigated.

The objective of better planning and more efficient implementation of the above programmes will require the close collaboration of all authorities involved in vocational training in Greece on the one hand and spokesmen of the social partners in both industries on the other.

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